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An investigation into the use of partnerships in national
social marketing campaigns in England

by

David John Shaw BSc (Hons) MSc

A thesis submitted to the Open University in fulfilment
of the requirements for the degree of

Doctor of Philosophy

The Open University Business School

Department of Strategy and Marketing

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Abstract

National government programmes to tackle behavioural issues impacting on public health in England have adopted a social marketing approach and the resultant campaigns have increasingly contained a partnerships element. However, there is a lack of academic literature regarding partnerships in social marketing particularly the contribution of partnerships to national behaviour change campaigns.

This research investigates the use of partnerships in national social marketing campaigns to generate a greater understanding of how partnerships are defined, why partnerships are used, how partnerships are created and maintained over time, and what the outcomes of partnerships are. Understanding these aspects of partnerships provides knowledge about their contribution to social marketing.

This research uses a case-study methodology within Public Health England, triangulating data from: (i) participant observation; (ii) analysis of documents; and (iii) semi-structured interviews. Thematic analysis of the entire data set suggests the approach to partnerships in national social marketing campaigns has evolved.

The reason why partnerships are used in national social marketing campaigns has changed from being simply a promotional tactic to support the communication of campaign messages to becoming a strategic component of the overall macro-level social marketing approach. The development process for partnerships has changed to reflect this approach to social marketing with a small number of long-term strategic partnerships being created and maintained. The outcomes of partnerships relate to both the campaigns and the individual partnerships themselves.

This study contributes to knowledge and practice by proposing and defining a new way of thinking about partnerships in national social marketing campaigns. Partnerships can be viewed holistically as a strategic concept in social marketing that supports the objective of behaviour change. As a concept, partnerships can play a strategic role in the long-term development and delivery of solutions to tackle complex social problems at a national level.

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Chapter 1

Overview of the research

1.1 Introduction

This research is a case study investigation into the use of partnerships in social marketing. The setting for the case study is Public Health England (PHE) and, through analysis of three data sources (observation, review of documentation and semi-structured interviews), the research defines partnerships in social marketing, examines why they are used in social marketing, how partnerships are created and maintained, and what the outcomes of partnerships are. In doing so, this study offers insight into the concept of partnerships in relation to social marketing.

1.2 Background

The background to this study is the huge challenge governments around the world face when trying to tackle issues such as controlling the spread of infectious disease, improving health outcomes, increasing the volume of recycling, reducing the misuse of alcohol, and lowering the level of crime. In 2018, the Annual Report of the UK Department of Health's Chief Medical Officer identified lifestyle behaviours such as poor diet, smoking tobacco, drinking alcohol in excess and physical inactivity as accounting for fifty percent of the disease burden in England (Davies, 2018). Hastings (2007) suggests that lifestyle related illnesses have become a greater risk to public health in Western societies, including the UK, than communicable diseases (World Health Organisation, 2002).

These social issues have been identified as “wicked problems” (Rittel and Webber, 1973) due to their highly complex nature, involving multiple stakeholders with different interests and values, making it extremely difficult for governments to clearly define the causes of the problem and gain agreement on potential solutions (Head and Alford, 2015). Attempts at tackling these policy challenges have increasingly adopted a social marketing approach (Asbury et al., 2008) because these social issues are seen to contain “significant behavioural elements” (French et al., 2009 p.1).

1.3 What is social marketing?

The success demonstrated by commercial marketers in the 1950s and 1960s in influencing consumer behaviour by putting customers at the heart of the business process led some academics to see the opportunity for using marketing to achieve “social good” and the idea of “social marketing” was put forward by Kotler and Zaltman in a paper of

1971. Two years later, Lazer and Kelley (1973) explained the idea of social marketing as the application of marketing to address social goals as well as economic ones.

As the field of social marketing developed, numerous definitions of social marketing were put forward until, in 2013, a consensus definition was published by the International Social Marketing Association as follows:

“Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good. Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable.” (iSMA, 2013)

This definition highlights that social marketing concentrates on the use of marketing principles to bring about social good. Social marketing is not a theory in of itself and, in line with traditional marketing, it provides a framework for applying theory, research and practice to complex issues that require behavioural or social change (Kassirer et al., 2019).

The iSMA definition of social marketing refers to “partnership insight” and the use of partnerships in national social marketing campaigns is the focus of this study and will be introduced in the next section.

1.4 The use of partnerships in national social marketing campaigns in England

The UK Government first recognised the potential of social marketing in achieving social good in the 2004 *“Choosing Health: Making Healthier Choices Easier”* White Paper published by the Department of Health (Department of Health, HM Government, UK, 2004). The Executive Summary published alongside the White Paper made a commitment to develop a cross-government marketing campaign to change behaviours that were leading to obesity. The White Paper also highlighted the opportunity of developing partnerships with industry to promote positive health information. In January 2009, the Department of Health (DH) launched the Change4Life campaign as a component of the 2008 cross-government strategy *“Healthy Weight, Healthy Lives”*. Change4Life was the first national social marketing campaign of its kind to be launched in the world and it aimed to change the behaviours that were leading to obesity in children by supporting families to eat more healthily and do more physical activity. The Change4Life campaign is

now in its eleventh year and DH also developed social marketing campaigns to tackle other health issues including smoking (Stoptober), cancer (Be Clear on Cancer) and stroke (ACT F.A.S.T.).

The 2012 Health and Social Care Act legislated for a reorganisation of the NHS in England and established Public Health England (PHE) as an executive agency of DH. PHE began operating in April 2013 and has responsibility for protecting and improving the health of people in England as well as addressing health inequalities. PHE is a distinct delivery organisation with operational autonomy to advise and support government, local authorities, and the NHS. The creation of PHE brought together public health specialists from more than 70 organisations into a single public health service and was part of a trend of public sector reforms where executive agencies were created and central ministries like DH were downsized (Ferlie and Ongaro, 2015). This approach gave PHE greater managerial autonomy than DH but the level of policy autonomy was still limited and determined by central government. As part of this reorganisation of public health responsibilities in England the DH Marketing team were “lifted and shifted” to PHE and formed the Marketing Directorate responsible for creating national social marketing campaigns aimed at improving the health of people in England.

As noted above, the 2004 *“Choosing Health: Making Healthier Choices Easier”* White Paper stated an ambition to create partnerships to support its health campaigns. This followed the development of the 5-A-Day programme, which was the first public health campaign created with a partnership element. This campaign was developed by DH in 2002 with the aim of increasing the consumption of fruit and vegetables by giving people a target for how many portions they should consume each day. The campaign was launched on 25 March 2003 with wide press coverage. A logo was created for the campaign whose licence could be granted by DH to products that met a set of nutritional guidelines. By the launch, a licence to use the logo was made available to be used by over 550 organizations and 700 fruit and vegetable products. The campaign was initially funded by public money but the ambition was that partners would take up some of the promotional costs over time. Partners included major grocery retail brands and food manufacturers who were given licence to carry the 5-A-Day logo on a selection of their products. These partners were able to support the campaign by communicating its messages and landing the idea of “5 a day” to the target audience as well as providing opportunities for people to get easy access to fruit and vegetables.

This type of activity, working with partners and entering into partnerships, carried out by government departments came under the Cabinet Office guidelines on Sponsorship and was referred to as “Partnership Marketing”. The Cabinet Office defined this as “the development and delivery of government messages via partnerships with private and

public sector organisations utilising one or more elements of the partners range of marketing communication channels. Partnership does not usually involve payment of any fee to the partner; it is generally an in-kind activity” (Cabinet Office, 2007 p.5).

This definition was used as a framework by DH when it set about creating the partnerships programme for Change4Life in 2009 and there are some key points to the definition that influenced the way partnerships were developed at this time. Firstly, it identified both the private and public sector as opportunities for creating partnerships. Secondly, it focused on the use of partners’ communications channels as method of delivering government messages. Finally, partner organisations are expected to deliver the government messages through its channels for free, described as “in-kind activity”, and this is potentially why the guidance was issued alongside guidance on sponsorship for government departments.

1.5 Partners versus Stakeholders

There is a close relationship between the terms ‘partners’ and ‘stakeholders’ and it is important to make the distinction between the two as applied to this study. Stakeholders are those organisations/people who have an interest in a social marketing programme whereas partners are organisations/people who play a more active role in a campaign (French et al., 2009). PHE create partnerships with organisations from the private, public and third sectors to deliver activity that supports their social marketing campaigns. It is these partnerships that provide the focus of this study.

1.6 The gaps in the literature

The initial idea for this research came from a journal article by Beall et al., (2012) which made the case for the need for more research into partnerships to support the further development of the practice of social marketing. From reviewing the literature, a lack of academic research into partnerships in social marketing was apparent, in spite of the need for such research having previously been identified by others (for example, Niblett, 2005; Lefebvre, 2006). More recently, Duane and Domegan (2019) conducted a review of the literature relating to partnerships in social marketing and identified the need for a greater understanding of partnerships in two specific areas:

- i. Scope: understanding of the state of practice, what makes social marketing partnerships successful and
- ii. Substance: a theoretical understanding of what constitutes social marketing partnerships (Duane and Domegan, 2019 p.170)

The literature does identify the use of partnerships in social marketing campaigns and highlights that its use is increasing (Duane, 2012). However, the perspective taken in most scholarly investigation into social marketing is purely an acknowledgement of the use of partnerships within a campaign as opposed to specific research into the concept of partnerships in social marketing. The specific gaps in the literature identified in this study are as follows:

- i. A lack of research into partnerships as a concept and its potential relationship with theory relating to social marketing.
- ii. An absence of an agreed definition of partnerships in relation to social marketing.
- iii. A limited justification of why partnerships are used in social marketing.
- iv. A limited understanding of how partnerships are created and maintained in social marketing.
- v. A lack of explanation of what the outcomes of partnerships in social marketing are.

These identified gaps in the literature informed the research questions for this study as presented in the next section.

1.7 The research questions

As noted above, partnerships in social marketing has received relatively little academic attention but, as a concept, partnerships is highly relevant to the study of social marketing, particularly as the use of partnerships is increasing in social marketing campaigns. The theoretical reasoning for the use of partnerships in social marketing is not explained leaving the rationale behind why partnerships are used and the process of how partnerships are created being left unclear. As such this study aims to generate a greater understanding of the use of partnerships in national social marketing campaigns and this informed the overarching research question for the study, which is as follows:

RQ1 - How can partnerships contribute to national social marketing campaigns?

Alvesson and Sandberg (2013) identify a hierarchy of higher-order and lower-order research questions and propose that developing knowledge through higher-order research questions often requires first generating answers to lower-order sub-questions. This was the approach taken in this study where RQ1 is a higher-order, normative question that can only be investigated once an understanding of lower-order sub-questions has been generated. To achieve this, the review of literature was used to identify gaps in understanding of partnerships in social marketing. Four sub-questions, RQ2, RQ3, RQ4 and RQ5, were developed to focus the research down on a number of

key factors that needed to be answered before RQ1 could be investigated. RQ2 is a lower-order, descriptive question that aims to find out how the phenomenon of partnerships is defined by PHE and the people involved in creating the partnerships. RQ3, RQ4 and RQ5 are lower-order explanatory questions that aim to generate knowledge of the why, how, and what of partnerships at PHE.

The literature review identified the absence of an agreed definition of partnerships in relation to social marketing. It was deemed necessary to understand how partnerships in social marketing was defined in the case study to be able to understand partnerships as a concept in social marketing and this informed the second research question as follows:

RQ2 – How might partnerships be defined by an executive government agency in their national social marketing campaigns?

The review of literature also highlighted gaps in understanding with regards to the why, how, and what of partnerships in social marketing. As such, there was a need for more clarity regarding why partnerships are used in social marketing and how they link to theory in behaviour change. Partnerships are increasingly being used in social marketing interventions but there is need for a clearer rationale for their use and the role they can play across the different approaches of micro, meso, and macro-social marketing. This informed the third research question, which is outlined below.

RQ3 - Why are partnerships created and maintained to support national social marketing campaigns?

There was also a need for greater explanation of how successful partnerships are created in social marketing and how relational partnerships are maintained to achieve their long-term aims. This requires further research into the management of partnerships in social marketing and the processes involved in their creation and maintenance. This informed the fourth research question, which is provided below.

RQ4 - How are partnerships created and maintained to support national social marketing campaigns?

Finally, the review of literature identified a lack of research and understanding with regards to the “what” of partnerships in social marketing and specifically the outcomes of partnerships, both in relation to the social marketing campaigns they have been used in and the partnerships themselves. This required further research into the actual outcomes of partnerships in social marketing and this informed the fifth research question as follows:

RQ5 - What are the outcomes of partnerships in national social marketing campaigns?

1.8 Research approach

This research adopts a Critical Realist philosophical framework in its attempt to gain a greater understanding of the use of partnerships in social marketing. The Critical Realist philosophy informed the choice of research approach with Case Study research being used to provide access to rich, qualitative data. Critical Realism also informed the selection of Thematic Analysis as the method of data analysis with the aim being to develop themes from the data to support the generation of a greater understanding into the use of partnerships in national social marketing campaigns and to develop insight into the use of partnerships that can have impact on knowledge and practice in social marketing.

The setting for this Case Study research is Public Health England (PHE). As noted above, PHE was formed in 2013 and includes a Marketing Directorate responsible for developing and delivering national social marketing campaigns to support the improvement of the health of people in England. PHE create partnerships as part of these campaigns and the Marketing Directorate provided the setting for this case study research. The rationale for this is explained and justified in the Methodology chapter of this thesis. During the research five social marketing campaigns were observed – Change4Life, Stoptober, Be Clear on Cancer, Act FAST, and One You.

1.9 The structure of this thesis

This thesis is organised into ten chapters. Following this introduction there is a literature review, then a methodology chapter and a data analysis chapter, after which come four chapters focused on the findings, followed by a discussion chapter and finally a conclusions chapter. This section provides a brief overview of each chapter.

The next chapter is the literature review (Chapter 2), which examines the academic literature focusing on partnerships and social marketing and a conceptual framework identified in the Inter-organisational Relations (IOR) literature is proposed as a lens through which partnerships in social marketing can be studied.

The methodology chapter (Chapter 3) that follows provides a full account of the methodological approach taken in this research. The study adopts a Critical Realist perspective, which asserts that human knowledge represents only a small part of a much larger reality. Critical Realists adopt a “stratified” ontology that assumes three levels of human knowledge – the Real Level, the Actual Level, and the Empirical Level (Bhasker, 1978). It is believed that observations of the social world can only take place at the Empirical Level and not the Actual or Real Levels. As such all knowledge is seen to be

fallible but, as the Real, Actual and Empirical levels are all connected, research conducted at the Empirical Level can shine a light on what is happening at the Real Level. The data analysis is presented in the next chapter (Chapter 4) and Thematic Analysis was applied to all data collected to support the development of themes.

Findings are presented in four chapters, the first of these (Chapter 5) presents a visual representation of all the findings in this study in the form of a framework developed to support their presentation and also show the scope of the research. The next findings chapter (Chapter 6) highlights the themes developed to generate a greater understanding of why partnerships are created and proposes a definition of the concept of partnerships in social marketing. The subsequent findings chapters present and justify the themes developed to better understand how partnerships are created and maintained in social marketing (Chapter 7) and the outcomes of partnerships in social marketing (Chapter 8).

The four findings chapters are followed by a discussion chapter (Chapter 9) that reviews the main themes developed from the research in conjunction with the academic theory used within social marketing. In the concluding chapter (Chapter 10), the key findings are summarised and the contributions of the study to knowledge and practice are set out. The research contributes to the broad area of partnerships in social marketing and proposes the concept of partnerships as a core component of social marketing strategy. It also indicates that partnerships provides an opportunity to effect a change in behaviour of the target audience in national social marketing campaigns. The limitations of the research are outlined and, as the chapter closes, connections to wider debates are discussed and possible future research directions are identified.

Chapter 2

Literature Review

2.1 Introduction

In the 1950s and 1960s commercial marketers demonstrated great success in influencing consumer behaviour by putting customers at the heart of the business process. As noted in section 1.2 above, this led some academics to see the opportunity for using marketing to achieve “social good” and the idea of “social marketing” was put forward by Kotler and Zaltman in 1971. French et al. (2009, p.1) propose that “nearly every big policy challenge facing governments around the world contains significant behavioural elements: for example, obesity, alcohol misuse, infection control, recycling, saving for retirement, and crime”. These types of social issues have been termed “wicked problems” (Rittel and Webber, 1973) due to their highly complex nature where the causes of the problem are difficult to define and the issue involves multiple parties with very different interests making it extremely difficult to agree potential solutions (Kennedy et al., 2016). In an attempt to tackle some of these challenges government programmes have increasingly adopted a social marketing approach (Asbury et al., 2008). In 2015, the United Nations adopted 17 Sustainable Development Goals (SDGs) as a world-wide call to action to tackle complex social issues and included Partnerships as SDG 17.

The use of partnerships within social marketing practice has grown over the past twenty years but this growth has not been reflected by the publication of empirical articles on the subject. Lefebvre (2006, p.41) states “partnership development for national social marketing campaigns is a much copied, but poorly researched, area of practice”. Beall et al., (2012) propose the need for further research into partnerships in social marketing and particularly the strategic management of partnerships at a national level. More recently, Duane and Domegan (2019), conducted a review of the literature relating to partnerships in social marketing and identified the need for a greater understanding of partnerships in two specific areas:

- i. Scope: understanding of the state of practice, what makes social marketing partnerships successful and
- ii. Substance: a theoretical understanding of what constitutes social marketing partnerships (Duane and Domegan, 2019 p.170)

The need for further research into partnerships in social marketing is important for the following reasons:

- i. There is a lack of theoretical understanding of the concept of partnerships in relation to social marketing and behaviour change. Importantly, there is no agreed definition of partnerships in social marketing. As the use of and reliance on partnerships in social marketing campaigns increases it is necessary to have a greater understanding of partnerships in social marketing.
- ii. There is a lack of explanation with regards to the use of partnerships in social marketing and it is unclear as to why partnerships are created, how they are created and maintained, and what the outcomes of the partnerships are. As public sector budgets for national social marketing campaigns reduce (Duane and Domegan, 2019) it is important that the understanding of partnerships by practitioners, as well as academics, is increased.

This literature review appraises the current state of knowledge and identifies the gaps relating to the use of partnerships in social marketing campaigns. It starts by reviewing the literature pertaining to the development of the field of social marketing and the theories that are relevant to it. This is followed by a focus on the use of partnerships in social marketing. The review then looks at the use of partnerships in the wider marketing and business literature. Finally, the gaps in the literature are identified to provide the rationale for conducting this research project and the justification for the choice of research questions.

2.2 The development of the field of Social Marketing

Social marketing is a relatively new and evolving field of research and practice. It was developed as a branch of marketing in the 1970s and is based on the core concepts of marketing – offerings, value creation, systematic processes, and stakeholders (French and Russell-Bennett, 2015). Like marketing, social marketing is a practical field of study that uses research to collect evidence, analyse data and build theory to try to influence behaviour for social good. As noted in Chapter 1, social marketing is not a theory, instead it provides a framework for applying theory, research and practice to complex issues that require behavioural or social change (Kassirer et al., 2019).

Social marketing has evolved over time to respond to changes in the environment in which social marketers operate in along with shifts in mainstream marketing thought. During this evolution three distinct approaches to social marketing strategy have developed – (i) micro-level social marketing; (ii) meso-level social marketing; and (iii) macro-level social marketing. Initially, social marketers adopted a micro-level approach to social marketing strategy focusing on individual behaviour change and this approach still dominates the field of social marketing. However, as the practice of social marketing

developed the idea of a meso-level approach aiming at community behaviour change was put forward (McKenzie-Mohr, 1996). As the field of social marketing further evolved the concept of a macro-level approach to social marketing strategy was suggested, which focused on national/societal behaviour change (Kennedy, 2016). The evolution of social marketing strategy is in line with the idea of “logical incrementalism” as put forward by Mintzberg, Ahlstrand and Lampel (1999, p.180), which proposes strategy develops in a continual process based on learnings over time. Understanding the three approaches to social marketing strategy is helpful in examining partnerships in social marketing as each approach focuses on changing behaviour at a different level of society, which may have influence on the use of partnerships. These three approaches are explored in more detail below:

2.2.1 Micro-level social marketing

At the time of social marketing’s “birth” in the 1970s, the field of marketing was going through the era of the “paradigm shift” (Wilkie and Moore, 2003 p.117) where the “selling concept” was being replaced by the “marketing concept” (Kotler and Keller, 2006). The marketing concept is characterised by a focus on individual entities such as consumers or organisations, which became known as micro-marketing. Micro-level marketing concentrates on interactions between individuals (consumers) and the exchanges that occur between individuals (Chandler and Vargo, 2011). The emphasis of academic work in marketing at this time was to support marketing managers in understanding and satisfying customer needs so they could make better marketing decisions and the 4 Ps (Product, Place, Price and Promotion) of the marketing mix were developed to support this approach (Wilkie and Moore, 2003).

Initially, proponents of social marketing embraced a similar micro-level marketing approach and social marketing academics set out to support practitioners in the development of social marketing programmes. Social marketing strategies adopted a focus on voluntary individual behaviour change through the provision of motivational exchanges (Andreasen, 1995) and incorporated the use of the 4 Ps to support this approach. The first definitions of social marketing reflect this micro-level approach, for example Kotler and Zaltman (1971) described social marketing as “the design, implementation and control of programs calculated to influence the acceptability of social ideas and involving considerations of product planning, pricing, communication, distribution and marketing research” (Kotler and Zaltman, 1971 p.5).

The micro-level approach to individual behaviour change is still the most recognised approach to the practice of social marketing and is often promoted in training materials as can be seen in the “customer triangle” model (see Figure 1 below) developed by the UK

National Social Marketing Centre (NSMC, 2011) to show the core concepts and principles of social marketing strategy. The model places the customer at the centre of a social marketing approach and identifies that the first task for a social marketing programme is to develop a clear understanding of the individual(s), considering all aspects of their lives. The model is intended to communicate that behaviour change interventions need to be underpinned by a clear understanding of three key areas: “insight”, “competition”, and “exchange”. Firstly, “insight” is developed into the individual(s) and what might motivate them to change behaviour and this requires extensive research into the context of their current behaviour and the factors relevant to positively influencing change to the desired behaviour. Secondly, an understanding of the “competition” is required through the identification of the individuals’ internal considerations (e.g. psychological factors) and external considerations (e.g. wider influences and influencers) that could prevent a change in behaviour. Thirdly, a compelling “exchange” needs to be created through an understanding of the perceived and actual costs of giving up the current behaviour and adopting the new behaviour. Exchange is key in social marketing (and marketing in general) and the development process is grounded in Exchange Theory (Bagozzi, 1975), which is explained in more detail in 2.7.1. of this chapter. Once insight into the individual(s) has been developed, the competition identified and understood, and an exchange proposition created, the target audience is then segmented, and an intervention mix developed for each particular segment (French et al., 2009). The intervention mix is the “offer” to be exchanged with the target audience and is generally formulated using a combination of the ‘4Ps’, the Product, the Price, the Place and the Promotion (Lee and Kotler, 2020).

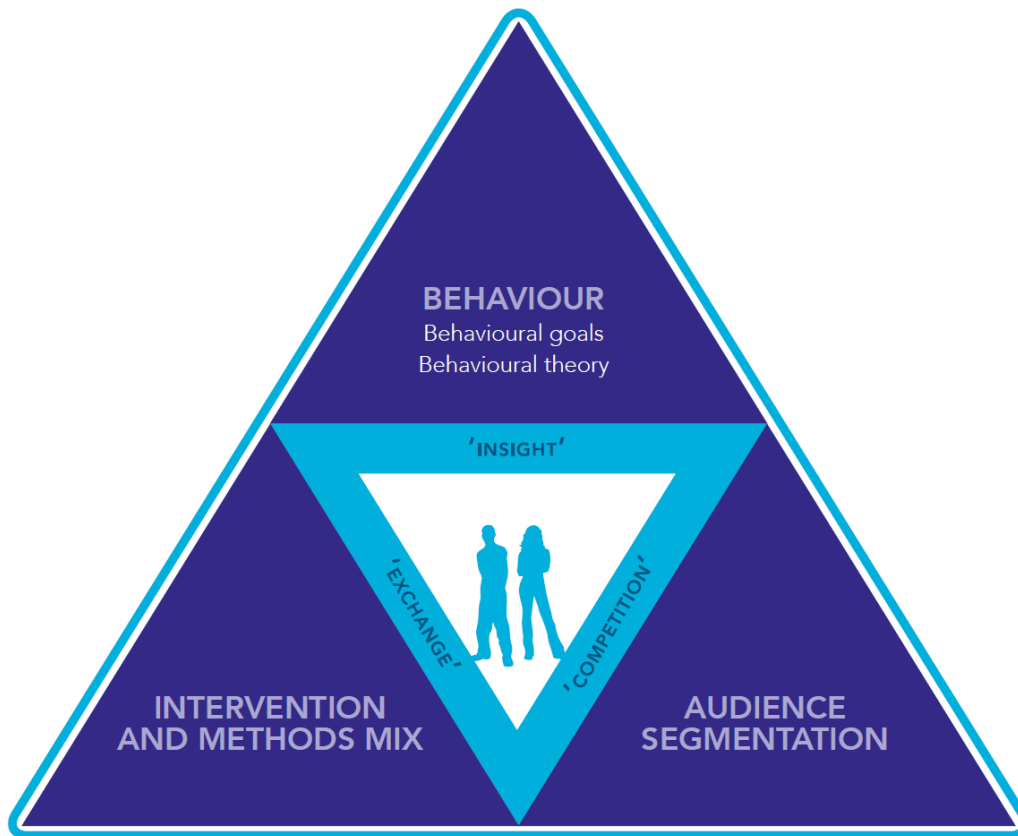


Figure 1: NSMC Customer Triangle - Source: NSMC (2011, p.47)

Section 2.3 of this chapter reviews the literature on partnerships in social marketing and will consider their role within this micro-level approach.

2.2.2 Meso-level social marketing

The field of social marketing developed and evolved over time to adapt to the complexity of the problems its practitioners were facing. These were referred to as “wicked problems” (Rittel and Webber, 1973) and required a different approach to social marketing practice. This led to a more meso-level social marketing approach being undertaken that was described as “community-based social marketing” (McKenzie-Mohr, 1996). Meso-level social marketing strategy emphasises the role of the community in supporting individual behaviour change and encourages social marketers to move beyond a focus on the consumer to consider all participants in the community who could collectively work together to bring about social change (McKenzie-Mohr, 1996).

Brennan, Previte and Fry (2016, p.220) explain the meso-level approach to social marketing strategy as one that conceives “social markets as constituted through the evolution of marketplace interactions between targeted citizens, communities, civic and commercial organisations engaged in social change strategies (e.g. marketing strategies, advocacy and partnerships) directed at achieving societal change and social value

creation". This highlights that all members of a community play a role in changing behaviour for social good and social marketers need to consider and engage the whole community rather than focusing on individuals within the community. Brennan, Previte and Fry (2016) also recognise the need for the creation and delivery of value in social marketing. Value consists of the tangible and intangible benefits and costs as perceived by the target audience with regards to changing behaviour. This need to create and deliver value has relevance to partnerships in social marketing and this will be considered in section 2.3 of this chapter.

2.2.3 Macro-level social marketing

As the field of social marketing matured, partly in response to a changing environment of increasingly complex social problems along with rapid technological developments, so social marketing thinking started to incorporate a macro-level approach. This shifted the focus of social marketing strategy away from trying to change the behaviour of individuals or communities towards changing the wider environment that is impacting on people's lives. The aim of macro-level social marketing is to bring about change at a societal level rather than an individual level (Kennedy, 2016) and government-led social marketing programmes have generally adopted a macro-level approach (Wymer, 2011). To support a macro-level approach in social marketing programmes Hastings and Domegan (2018, p.85) recommend the use of "strategic planning" and propose a framework for a "social marketing plan" that includes a situational analysis of the environment along with research into the market as well as the consumer.

2.2.4 Systems social marketing

The evolution of social marketing strategy from micro-level to meso-level and macro-level led some academics to consider the complex and multi-faceted social problems being faced by social marketers in a more holistic way seeing the different levels as part of one interconnected "system" (Biroscak et al., 2014; Domegan et al., 2016; Kennedy, 2017; Truong, 2017; Flaherty et al., 2020). This approach has been termed Systems Social Marketing (SSM) and recognises the requirement for "societal or systems-wide change" to tackle complex social problems (Truong, Saunders and Dong, 2018 p.185). SSM is based on the concept of marketing systems as put forward by Layton (2007, 2009, 2011, 2015). Layton (2007, p.230) defines a marketing system as a "network of individuals, groups and/or entities linked directly or indirectly through sequential or shared participation in economic exchange that creates, assembles, transforms and makes available assortments of products, both tangible and intangible, provided in response to customer demand". Marketing systems are sub-systems of the economic system, which is a social

system. Marketing systems can be changed when there is a shift in the accepted norms and shared understandings within the system (Kemper and Ballantine, 2017).

Applying a systems approach to social marketing strategy requires a change of mindset away from thinking about changing behaviour at either the individual (micro), community (meso) or government (macro) level to seeing the social problem within a system that impacts on individual choices. An ecological framework based on the work of Bronfenbrenner (1979) has been put forward as a way to visualise a social marketing system (Wood, 2016; Brennan, Previte and Fry, 2016). This approach sees the individual surrounded by their particular micro-system that has influence on them (e.g. their friends and family). These are encompassed by their meso-system which connects indirect effects from their exo-system (e.g. organisations and media) with their micro-system (e.g. through workplaces, schools and groups). Finally, their macro-system surrounds all these layers with influences like culture, religion, and laws (Kennedy, 2017). This is visualised in Figure 2 below:

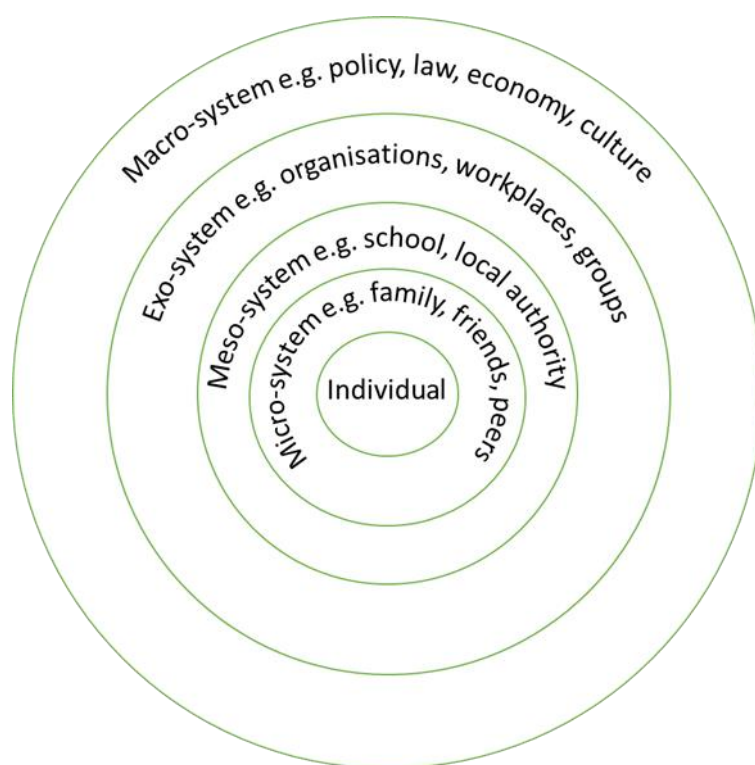


Figure 2 - Visualisation of a marketing system - adapted from Gordon et al. (2017, p.106)

SSM differs from other approaches to social marketing strategy as it moves away from using theory that focuses on individual behaviour change and instead looks to theories and models that help investigate the behaviour of the system (Truong, Saunders and Dong, 2018). The rationale for this approach is that you need to change the system as well as the behaviour of individuals within the system (Parkinson et al., 2017). To achieve societal change SSM recognises that the context of the social problem needs to be understood at multiple levels (micro, meso, exo and macro) and any intervention needs to

focus on changing the environment the problem exists in at all levels simultaneously. Brennan, Previte and Fry (2016, p.221) argue that currently “social marketers are failing to see the broader societal and cultural contexts of health and government decision-making, which impacts how, when and who participates in social marketing programmes and the wider social change agenda”.

This change to a systems social marketing approach has relevance to partnerships in social marketing and this will be explored in the next section of this chapter.

2.3 Defining partnerships in social marketing

Although partnerships have become a common feature of social marketing programmes, this review of literature found no agreed definition of partnerships in social marketing. The absence of an agreed definition for partnerships in social marketing and the lack of a consensus of what exactly a partnership is in relation to social marketing has caused ambiguity and confusion (Duane and Domegan, 2019). Partnerships has become a “nebulous term” in social marketing and means different things to different people (Duane and Domegan, 2019 p.185). The absence of a definition of partnerships in social marketing makes it difficult to grasp and comprehend as a concept.

The review of literature for this study identified two published definitions of partnerships in relation to social marketing. The first definition, put forward by Niblett (2005), describes a social marketing partnership as:

“a voluntary collaboration between two or more private-sector, non-profit (or government) institutions that has: 1) a written agreement; 2) goal of mutual benefit; 3) resource transfers; and 4) substantive purpose” (AED, 2000 p.11).

The second definition, suggested by French et al. (2009), refers to partnerships in social marketing as:

“the way different organisations can agree to come together around a shared commitment to a particular endeavour or cause. Partners bring different resources, skills and expertise to a partnership to achieve things that they could not achieve alone” (French et al., 2009 p.309).

Having reviewed these two definitions along with the literature relating to partnerships in social marketing there appear to be a number of common characteristics such as:

- Partnerships require a purpose
- Partnerships need to provide mutual benefit
- Partnerships require the partners to share a commitment to a cause

- Partnerships bring together the different resources and skills of the partners
- Partnerships are voluntary and no money changes hands between the partners

The issues identified by Duane and Domegan (2019) resulting from the lack of an agreed definition of partnerships in social marketing appear to have been compounded by a confusion between partnerships in social marketing and the concept of Corporate Social Marketing (CSM). CSM aims to create individual behaviour change using “business resources to develop and/or implement a behaviour change campaign intended to improve public health, safety, the environment or community well-being” (Kotler, Hessekiel, and Lee, 2012 p.111). CSM is conducted by commercial organisations using corporate resources. It differs from partnerships in social marketing, which are created by social marketing practitioners as part of a behaviour change programme.

Whilst there are proponents of CSM it also has critics within the social marketing community. Cynics of CSM suggest it has been used by companies to mislead the public into believing they have a concern for a problem in society when in reality they are simply focused on profit and company good rather than social good (Deshpande, 2016; Austin and Gaither, 2016). Hastings (2016) believes corporations are “constitutionally incapable of altruism” because they are obligated to focus “on preserving and enhancing shareholder value” and gives the example of The Coca Cola Company linking up with the Worldwide Fund for Nature (WWF). He notes a quote from Carter Roberts, the chief executive officer of WWF in the United States, that highlights Coca Cola’s motives by stating “we have built our partnership on targets, very specific targets, for achieving growth at Coke” (Hastings, 2013 p.133).

Lafferty (2007) investigated the involvement of organisations and brands in the support of a cause and found that corporate credibility was more important to consumers than the organisation’s/brand’s “fit” to the cause, and that corporate credibility was integral to the success of any partnership between an organisation or brand and a cause. The concept of corporate credibility is part of the wider academic literature on source credibility, which has implications for partnerships in social marketing and will be reviewed in section 2.5 of this chapter.

The absence of an agreed definition of partnerships in social marketing provides an opportunity for one to be developed through research in this study. The definition of partnerships is connected to the use and role partnerships in social marketing and the literature related to this is reviewed in the next section of this chapter.

2.4 The Use and Role of Partnerships in Social Marketing

As the field of social marketing has evolved, so the use of partnerships in social marketing campaigns has increased. These campaigns generally take a micro-level social marketing approach and the partnerships involve the social marketer working with an external organisation or individual from the commercial, public or third sector to deliver activity in support of their social marketing campaign. The extension of the field to include meso-level and macro-level social marketing programmes has required social marketers to consider the wider determinants and environment of the social issue they are looking to bring about change in. This includes entities from the public sector, private sector and third sector at a national and community level that can support social change and behaviour change. Partnerships may provide an opportunity to support change, both behavioural and societal, and may have a role to play in the exchange process, in the development of relationships and in the creation of value.

Nedra Klein Weinreich (1999) was one of the first social marketing practitioners to advocate the use of partnerships. Her practical textbook “Hands-on Social Marketing”, published in 1999, suggested social marketers take a meso-level social marketing approach that involved the use of partnerships because:

“social and health issues often are so complex that one organisation cannot make a dent by itself. By teaming up with other groups in the community, your organisation can extend its resources as well as its access to members of the target audience” (Weinreich, 1999 p.17).

These “other groups” might be local businesses, schools, charities, or local government departments.

Weinreich (1999, 2010) viewed partnerships as something that could support a social marketing intervention/campaign and included Partnerships in her “8P’s” of a social marketing mix alongside Product, Price, Place, Promotion, Publics, Policy and Purse-strings. Based on her experience of working on social marketing programmes, Weinreich (1999, p.40) suggested prospective partners could be individuals or organisations in the community, including the public, private or voluntary sectors. Weinreich (1999) believed that partnerships could bring the potential benefits of extending the reach and increasing the credibility of a campaign. However, they also brought the challenge of a loss of ownership and being time consuming. To maximise the benefits and minimise the challenges Weinreich (1999, p.41) recommended social marketers be “strategic” when creating partnerships by selecting partners who offered the greatest access to and credibility with the target audience.

Donovan and Henley (2010) also included Partnerships as a stand-alone tactic in their social marketing mix of '7Ps', along with Product, Price, Place, Promotion, Policy and People. Hastings and Domegan (2018) augmented the traditional "4Ps" with the addition of Participation, Partnerships and Positioning. They observed that "Partnerships are widely accepted as the 5th 'P' in the social marketing intervention mix" (Hastings and Domegan, 2018 p.112).

The importance of partnerships in social marketing was recognised by the 10th Innovation in Social Marketing (ISM) conference in 2005. Partnerships was selected as one of two themes for the conference along with macro-social marketing interventions, which it termed as "upstream" and involves influencing policy makers to change the macro-environment at a national or global level to achieve social good. Gregory Niblett, Senior Vice President of the AED Social Change Group, was Chairman of the conference and he acknowledged the reasoning for the inclusion of partnerships as a theme was the result of repeated suggestions from participants of previous events (Niblett, 2005). Niblett (2005) stated in his address that "partnerships are key in almost every social marketing project I have observed" and his reasoning for this was that partners could plug the gap in the lack of resources and infrastructure that social marketers experienced. Niblett (2005) noted frequent references to partnerships in social marketing campaigns but a lack of definition of partnerships. Interestingly, the conference steering committee chose not to define partnerships prior to the event to provide participants with flexibility to present their own ideas and interpretations (Niblett, 2005). As noted in section 2.3 above, this provides an opportunity for a definition of partnerships in social marketing to be developed through research in this study.

When setting the context for the conference, Niblett (2005, p.13) did reference a definition of partnerships, which was developed by the AED, and this was reviewed in section 2.3 above. The focus of the conference presentations and discussions on partnerships in social marketing appear to have centred around the following issues – (i) should social marketers partner with commercial organisations?; (ii) what are cause-related partnerships?; (iii) the development of a taxonomy of partnerships; (iv) sharing best practice in the use of partnerships; and (v) sharing examples of organisations participants had partnered with. These presentations and debates were recorded in a special "Partnerships" edition of the *Social Marketing Quarterly* at the end of 2005 and guest edited by Niblett. In this edition, partnerships are recognised as essential in social marketing because they can deliver value through all 4Ps of the marketing mix (Niblett, 2005; Legarde, 2005; Denniston, 2005). The benefits of partnerships to social marketing put forward by the authors include - bringing visibility and credibility to campaigns, supporting the communication of campaign messages, and delivering products to the

target audience (Niblett, 2005; Legarde, 2005; Denniston, 2005). One article discussed the requirement to consider “goal congruence, level of trust, and need for a formal contract” between the partners in a social marketing partnership (Donovan, 2005 p.39).

Although partnerships are put forward as essential in social marketing at the ISM conference and in the subsequent special edition of *Social Marketing Quarterly*, there appears to be a lack of evidence provided to explain why partnerships are used in social marketing, how they are managed (particularly their creation and maintenance) and what the outcomes of the partnerships are. More importantly, there appears to be little consideration of partnerships as a concept and its role in changing behaviour in social marketing. There appears to be an acceptance that the role of partnerships is limited to supporting the marketing mix and the possibility of partnerships supporting behaviour change was not explored. This lack of research was noted by Niblett (2005) and reiterated by Lefebvre (2006, p.41) who stated, “the study of the development and implementation of partnerships at the national level has been relatively ignored”.

Despite the calls for more research into partnerships in social marketing highlighted above the review of literature in this study of partnerships found only a limited number of academic papers on the subject (for example - Thomas, 2008; Abercrombie et al., 2012; Beall et al., 2012; Duane, 2012; Duane and Domegan, 2019). A number of papers were identified that included examples of the use of partnerships in social marketing (Donovan, 2005; Lagarde et al., 2005; Lefebvre, 2006; Dibb, 2014) but very few showed evidence of research into the partnerships themselves. There was recognition in the literature that not everyone working in social marketing saw the use of partnerships as positive. Thomas (2008, p.72) noted that two social marketing projects in the UK she worked on “encountered some difficulties as people grappled with the idea of “fraternising” with the enemy, a profit-driven organisation selling both healthy and unhealthy products”. This highlights the importance of trust in partnerships in social marketing and suggests a potential lack of trust of the motives of commercial organisations involved in partnerships by those looking to bring about social change for good.

French et al. (2009) provide a counter to this concern regarding the use of partnerships in social marketing by setting out the case for using partnerships in their textbook *“Social Marketing and Public Health”*. They argue for the specific need for partnerships in tackling issues to improve public health and suggest that partners can provide “reach, expertise, and deep understanding of people” (French et al., 2009 p.9) and promote partnerships with the private sector as an opportunity for social marketers. They promote the use of “cross-sector partnerships”, where public, private and third sectors organisations work together, to support behaviour change programmes by the “sharing of expertise and resources...that build trust” (French et al., 2009 p.302). French et al. (2009) provided a

definition of partnerships in social marketing and this was reviewed in section 2.3 above. French et al. (2009) also made an important distinction between partners and stakeholders by noting that stakeholders tend to have an interest in a social marketing programme whereas partners play a more active role in a campaign.

The review of literature in this study did identify an important contribution to the study of partnerships in social marketing in the form of a PhD thesis by Sinead Duane submitted in 2012. The primary objective of Duane's (2012) research was "to develop a social marketing partnership framework through the extension of Morgan and Hunt's (1994) Key Moderating Variable model (see Figure 3 below) within the social marketing domain". Duane (2012) proposed a social marketing partnership model (see Figure 4 below) to show the various components that impact on a partnership in social marketing and illustrate how these components are interconnected.

Morgan and Hunt's (1994) original model was applied to Relationship Marketing and proposed relationship commitment and trust as key-mediating variables (KMV) in the success of relationships in commercial marketing. The two key variables are impacted by five important antecedents and five outcomes. Their KMV model (see Figure 3 below) places the five antecedents (relationship termination costs, relationships benefits, shared values, communication, and opportunistic behaviour) on the left, the five outcomes (acquiescence, propensity to leave, cooperation, functional conflict, and uncertainty) on the right and the two key mediating variables of relationship commitment and trust in the centre. The arrows show the direction of impact and the plus or minus sign highlights the nature of the impact. For example, the existence of shared values can have a positive impact on both relationship commitment and trust in a relational exchange whereas a loss of trust can have a negative impact by creating uncertainty.

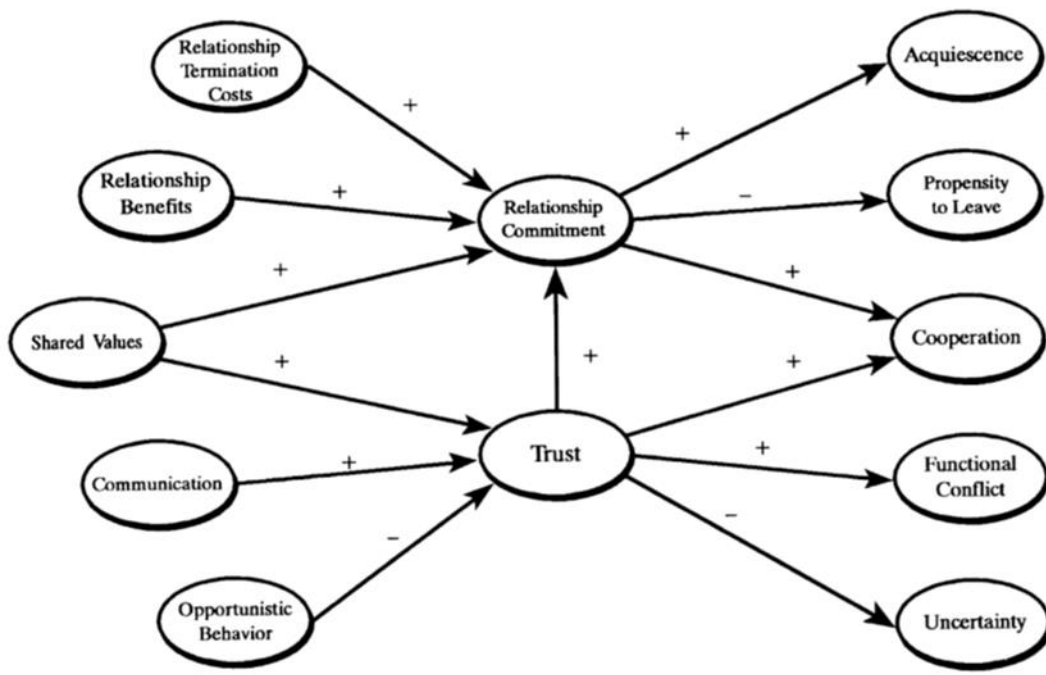


Figure 3: The Key Mediating Variables (KMV) Model of Relationship Marketing - Source: Morgan and Hunt (1994, p.22)

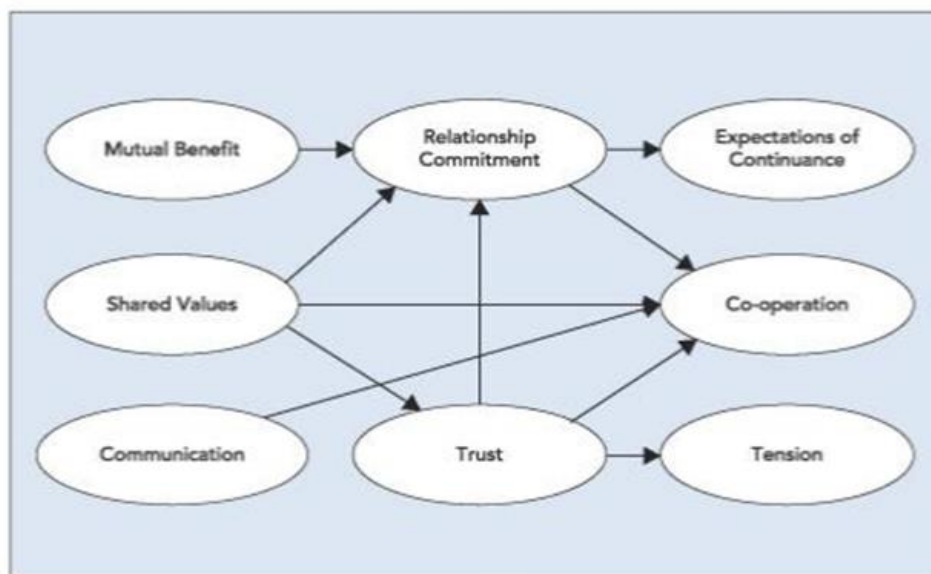


Figure 4: A Social Marketing Partnership Model - Source: Duane (2012, p.274)

Duane (2012) applied Morgan and Hunt's Trust and Relationship Commitment model to a social marketing context and proposed a new model with three antecedents of social marketing partnerships (mutual benefit, shared values, and communication) and three outcomes of social marketing partnerships (expectations of continuance, co-operation and tension). In line with Morgan and Hunt's (1994) original KMV model the arrows on Duane's (2012) model show the direction of impact. For example, the antecedent of shared values has impact on both relationship commitment and trust in a social marketing

partnership as well as co-operation. Trust has an impact on relationship commitment, and the outcomes of co-operation and tension.

Duane's (2012) model does not include Morgan and Hunt's (1994) original antecedent factor of opportunistic behaviour as her research suggested this was not appropriate in a social marketing context. Duane (2012) also combined Morgan and Hunt's (1994) two antecedents of relationship termination costs and relationships benefits to create the new antecedent of mutual benefit. The inclusion of mutual benefit as a requirement for social marketing partnerships implies that organisations will work together in a partnership to solve a social problem as long as they both achieve individual goals of their own. Duane's (2012) research also suggested Morgan and Hunt's (1994) four outcomes of acquiescence, propensity to leave, functional conflict and uncertainty were not appropriate to a social marketing context and replaced these with the two alternative outcomes of expectations of continuance and tension.

Duane's (2012) research suggests two types of partnership being created in social marketing campaigns - the intervention-led type and the relational type. The intervention-led partnership is used by social marketers looking to develop a short-term partnership with an organisation to supply a product/service to support their social marketing campaign. The relational partnership is used by social marketers with a longer-term focus to their social marketing campaign. However, both types of partnership appear to be used as a part of the social marketing mix.

As noted above, the evolution of social marketing strategy from micro-level to macro-level behaviour change requires social marketers to look to change behaviour in the marketing environment as a whole, necessitating the involvement of a great many organisations and the development of partnerships if it is to be successful in bringing about significant social change (Andreasen, 2006). The subsequent introduction of the idea of Systems Social Marketing (SSM) highlights the requirement for "marketplace solutions" to achieve long-term sustainable change at both the individual and societal level (Brennan, Previte and Fry, 2016 p.220). The relationships and interactions between actors in the marketing system provide social marketers with an opportunity to influence social change through the support of "strategic partnerships and social alliances" (Brennan, Previte and Fry, 2016 p.224). Kennedy (2016, p.361) highlighted the need for the creation of partnerships "with suppliers, retailers, regulatory bodies and the media" as part of a macro-social marketing approach to addressing problems being created for workers, the environment, and society by the Textiles and Fashion Industry. Similarly, Bryant et al. (2014, p220) identified partnerships as integral to social marketing interventions aimed at "creating change at policy, system and environmental levels" and highlight community coalitions consisting of community-based partnerships as being successful agents of change in the

United States. Parkinson et al. (2017, p.396) state that “social marketing has the potential to progress action when it facilitates joint efforts with stakeholders across and between micro, meso, exo and macro levels”.

The findings above suggest a greater role for partnerships in social marketing than simply a resource to support a campaign/intervention but partnerships are still presented as an additional “P” in the social marketing toolkit in the macro-social marketing and systems social marketing literature (Denniston, Bentz, Dorfman, and Novelli, 2005; Kennedy, 2016; Hastings and Domegan, 2018).

2.5 Government-led social marketing programmes

As noted previously, governments around the world are increasingly adopting a social marketing approach to tackle the highly complex social problems they are faced with (Asbury et al., 2008). Government-led social marketing programmes generally take a macro-level approach (Wymer, 2011) and seek to achieve societal change (Truong, 2017). A government-led macro-level social marketing strategy usually takes the form of a national programme that aims to make changes to “environments, markets and public policies” (Truong, 2017 p. 411).

The purpose of government-led national social marketing programmes are to influence the social and cultural contexts that envelop social issues and, by doing so, support changes in the behaviour of individuals (Truong, Saunders and Dong, 2019). These social contexts consist of multiple stakeholders that have relationships and interactions with each other and governments need to gain an understanding of, and engage with, the key stakeholders to gain a comprehensive picture of the issue (Truong, Saunders and Dong, 2019). This suggests a need for partnerships in government-led national social marketing campaigns, a view support by Truong and Hall (2017, p.888) who state, “lasting success in influencing behavioural change requires strategic, long-term partnerships between government agencies, NGOs and private companies”.

There is an argument that government-led social marketing campaigns fall under the auspices of political marketing as they influence the relationship between the citizen and the state (O'Shaughnessy, 1996). There is also a suggestion that social marketing campaigns run by governments are inextricably linked to the operations of the government itself by the promotion of a particular set of policies or initiatives (Walsh, 1994).

Raftopoulou and Hogg (2010, p.1209) propose that social marketing campaigns run by governments take on a political role as “the government is no longer an impartial, external party within the process of exchange but instead play the role of initiator”. However,

Collins and Butler (2003) feel social marketing campaigns can be seen as non-political as there is an assumption that public servants have to remain politically neutral.

The role of Government in social marketing has particular relevance to this study with its focus being on the work of Public Health England (PHE), an executive agency of the UK Department of Health (DH), and their use of partnerships in social marketing campaigns.

2.6 Source credibility and partnerships

As noted above, social marketing programmes are increasingly using partnerships as part of their marketing mix including the use of partners to communicate messages to the target audience. This means the concept of “source credibility”, and in particular “corporate credibility”, may have implications for partnerships in social marketing as it has been identified as an important factor in marketing communications (Goldsmith, Lafferty and Newell, 2000). Source credibility is defined as “the extent to which the recipient sees the source as having relevant knowledge, skill or experience and trusts the source to give unbiased, objective information” (Belch and Belch, 1994 p.189). Source credibility has been found to be influenced by the “expertise” and the “trustworthiness” of the person or organisation presenting the message and has been proposed to be an important factor in information processing and attitude development (Pornpitakpan, 2004). Expertise directly influences whether the target audience thinks that the source is worth listening to. Trustworthiness impacts on whether the target audience think they should listen to the advice, information, or argument.

Source credibility can be thought of in two ways: corporate credibility and endorser credibility. Corporate credibility is “whether a company can be relied on to do what it says it will do” (Herbig and Milewicz, 1995 p.6) and refers to “consumer and other stakeholder perceptions of a company’s trustworthiness and expertise, that is, the believability of its intentions and communications at a particular moment in time” (Goldsmith, Lafferty and Newell, 2000 p.304). Endorser credibility is similar to corporate credibility but relates to the perceptions of consumers as to the credibility of an endorser. These perceptions are created by the endorser’s attractiveness, expertise with the endorsed product/service and their trustworthiness (Ohanian, 1990). The credibility of a company in the eyes of consumers and stakeholders is integral to the success of its marketing and branding strategies and both corporate and endorser credibility can play a role in the effectiveness of marketing communications, influencing the reaction of consumers to brands, adverts, and promotions (Goldsmith, Lafferty and Newell, 2000).

2.7 The application of theory in relation to social marketing

As noted previously, social marketing is not a theory in itself and there is no single theoretical approach that underpins its use. As the field of social marketing has developed the thinking of academics about it has also evolved and this has led to a growth in the number of theories being applied in social marketing. French et al. (2009) propose social marketing is best understood as deriving from two parents - marketing and social sciences. This perspective and the iSMA definition (noted in section 1.2 above) suggest social marketing is not based solely on marketing techniques but also utilises the research and theoretical methodologies of the academic literature of the social sciences.

Key theories and concepts that have been proposed in relation to the creation of value in social marketing and have relevance to the use of partnerships include Exchange Theory, Relationship Marketing, Value Co-Creation, and Marketing Systems. These will be explored further in sections 2.7.1 to 2.7.4 below.

2.7.1 Exchange Theory

The initial micro-level approach to social marketing adopted the dominant theory applied to marketing of the time, which focused on the concept of exchange. It was argued that “marketing does not occur unless there are two or more parties, each with something to exchange, and both able to carry out communications and distribution” (Kotler and Zaltman, 1971 p. 4). Exchange theory dominated early social marketing thought with Bagozzi (1975, p38) stating “there is most definitely an exchange in social marketing relationships”. A transactional approach was utilised to promote individual behaviour change with the assumption being that to change the behaviour of individuals you needed to offer an alternative behaviour that had the same or greater benefit to the individual than their current behaviour. This approach suggests a basic-type exchange, referred to by Bagozzi (1975, p.32) as “restricted exchange”, where a two-party relationship exists and party A gives something to and receives something in exchange from party B ($A \leftrightarrow B$). The idea of restricted exchange can also be applied to partnerships in social marketing with regards to the social marketing practitioner and the partner. In this type of partnership the social marketing practitioner would provide something to the partner in exchange for something in return.

Bagozzi (1975, p.33) also identified that multiple parties could be involved in the exchange process, which he termed “complex exchange” and defined as “a system of mutual relationships between at least three parties”. Unlike restricted exchanges, complex exchanges involve exchange relationships that develop over time. These relationships can be represented as $A \leftrightarrow B \leftrightarrow C \leftrightarrow A$. In a complex exchange party A develops a mutually

beneficial relationship with party B to facilitate an exchange with party C and as such all parties benefit from the exchange process. The idea of complex exchange is seen as more representative of the type of relationships social marketers need to create in order to tackle the difficult social problems they are facing (Duane et al., 2015). Complex exchange can also be applied to partnerships in social marketing. For example, a social marketing practitioner might develop a relationship with a pharmacy chain to provide advice and distribute smoking cessation products to smokers looking to quit.

With regards to exchange, Kotler and Lee (2008, p.206) identify three types of product in social marketing - the “core” product, the “actual” product, and the “augmented” product. The core product is the benefit the target audience receive from changing their behaviour, for example, having improved health and more money when giving up smoking. The actual product is the behaviour being targeted for change, for example, stopping smoking. The augmented product is the additional goods and services used to support the change in behaviour, for example, nicotine patches or a stop smoking clinic to support smokers in quitting smoking. It is these augmented products that could be developed and/or distributed through partnerships.

Linked to exchange theory and a core concept of marketing and social marketing is the creation and delivery of value. Three domains of value creation have been proposed in social marketing: “value through exchange”; “value through use”; and “value in behaviour” (French and Gordon, 2015 p.153). The traditional micro-level approach to social marketing appears to assume “value through exchange” and accepts that value is created for the target audience by the social marketer and is embedded in the offering being exchanged. However, it has been suggested that social marketers need to adapt their approach to consider “value through use”, where value is perceived and determined by the customer and is only realised through the consumption experience, and “value in behaviour”, where value is created through use and is perceived by the customer through the experience of the behaviour (French and Gordon, 2015).

The idea of “value in behaviour” has led social marketers to consider a more relational approach and this will be explored in the next section.

2.7.2 Relationship Marketing

The traditional micro-level, transactional approach to social marketing to generate individual behaviour change has been questioned by some social marketing academics (e.g. Hastings, 2003; Marques and Domegan, 2011) who suggest a more relational approach is required to change complex social behaviours and they propose applying the concept of Relationship Marketing in social marketing. Relationship Marketing theory was

seen as a new paradigm for commercial marketing and has been described as “marketing based on relationships, networks and interaction, recognizing that marketing is embedded in the total management of the networks of the selling organization, the market and society” (Gummesson, 1999 p.24).

Relationship Marketing can be applied to partnerships in social marketing in two ways. Firstly, social marketing practitioners could adopt a relational to partnerships by developing long-term relationships with their partners. As Relationship Marketing theory encourages social marketers to adopt a multi-domain, macro-level approach involving complex exchange, this could be achieved through long-term relationships with a “network” of partners. Secondly, in line with complex exchange theory, social marketing practitioners could develop relationships with partners who in turn develop relationships with the target audience.

Duane et al. (2016, p.858) propose that in social marketing “multi-domain long-term relational interventions should replace single domain short-term transactional interventions”. A single domain intervention simply focuses on changing individual behaviour, as noted in the micro-level social marketing approach in section 2.2.1 above. A multi-domain intervention considers the whole environment that the behaviour is taking place in and looks to influence change at the societal, community and individual level, as noted in the macro-level social marketing approach in section 2.2.3 above. For example, a multi-domain social marketing intervention to tackle climate change would require consideration of the whole environment at international, national, community and individual levels. Social marketers are being encouraged to move away from a focus on micro-level interventions that utilise a single-domain, restricted exchange approach to achieve individual behaviour change. Instead, there is a belief that social marketing requires a more macro-level, multi-domain approach where the intervention consists of multiple levels of co-ordinated exchanges within the social system. This multi-domain approach requires an interconnected network of exchanges (complex exchange) where exchange relationships are required and these are developed over time (Duane et al., 2016).

Behaviour change “is a long-term venture, not a short-term transaction” (Brennan, Previte and Fry, 2016 p.232) and social marketing has certain traits that make a relational approach more appropriate. These include:

- lack of a profit motive,
- emphasis on high-involvement decisions,
- complex behaviours,

- changes that take long periods of time,
- importance of trust, and
- focus on targeting the neediest in society (Brennan, Previte and Fry, 2016 p.232).

As noted previously, creating value is a core objective of social marketing and marketing in general (French and Gordon, 2015) and adopting a relational approach can support the creation of value. Relationship marketing looks beyond the creation of economic or functional value (value through exchange) towards more of an emotional bonding where the purpose is “share of heart” rather than “share of wallet” (Sheth, 2017 p.7). In social marketing, a relational approach could support the creation of “value through use”, for example, a stop smoking service developing relationships with smokers while supporting them through their quit attempt, and the creation of “value in behaviour”, for example, the same stop smoking service keeping up the relationship with the smoker after they have quit to encourage them to enjoy their new behaviour of being a non-smoker. The development of long-term relationships can support the co-creation of value between the social marketing organisation and their priority audience, potentially leading to higher perceived value of changing to the desired behaviour. The idea of Value Co-creation will be discussed in the next section of this chapter.

2.7.3 Value Co-creation

As noted above, the concept of value has been a core component of commercial marketing for many years and has recently been seen as key in social marketing (French and Gordon, 2015). They argue that one of the core objectives for social marketing should be an orientation towards value creation, the creation of something that has perceived worth or importance to the target audience and suggest that focusing on the systemic creation of value provides social marketers with the advantage of a more 360-degree view of the decisions, processes, practices and external factors that are relevant to the individual and the wider society (French and Gordon, 2015).

The concept of “co-creation of value” has been proposed in marketing (Prahalad and Ramaswamy, 2004; Vargo and Lusch, 2004) and it involves the joint creation of value by the organisation and the customer, where the customer is involved in co-constructing the consumption experience to suit their context or situation. Co-creation of value has been applied to the social marketing context and involves the social marketer viewing their target audience as collaborators in the approach to behaviour change (Lefebvre, 2012). To achieve co-creation of value the social marketer could work with members of the target audience to develop a product or service that has perceived worth to the target audience and encourages behaviour change.

Zainuddin et al. (2013) suggest the understanding of value in social marketing is limited and purport that more research is required into both functional value (related to the performance of a product/service) and emotional value (related to the feelings created by the consumption of a product/service (as defined in 2.7.1 above)) to better support value co-creation. Domegan et al. (2013) propose that value co-creation requires the involvement of the target audience in the development of social marketing interventions to enable value to be “co-discovered”, “co-designed” and “co-delivered”. For example, a social marketer could work with smokers to co-create a stop-smoking service in their community that has perceived worth to all parties. This view is supported by Luca, Hibbert and McDonald (2015, 2016) who propose the concept of value co-creation has clear implications for social marketing programmes as it requires engagement with customers “as active participants in all phases of social change from defining the problem to formulating, enabling, enacting and evaluating change” (Luca, Hibbert and McDonald, 2015 p.205). They applied this idea to meso-level social marketing and identified the need for collaboration with both customers and other actors in the community. This requires identifying the key actors in the community and building relationships with them to co-create value with these actors and the customers. They also identified the need for a “focal actor” to initiate social change in the community (Luca, Hibbert and McDonald, 2016 p.1149).

The above suggests partnerships could have a role in the co-creation of value in social marketing as the social marketing practitioner could work with a partner and members of the target audience to co-create something that provides value to all parties, however, the review of literature in this study found no research in this area.

2.7.4 Marketing Systems

As highlighted in Section 2.2 above, social marketers are tackling complex social issues and the idea of a “marketing systems” approach has been identified as a potential way forward (French and Gordon, 2015; Hastings and Domegan, 2014; 2018). Seeing a social issue in the context of a marketing system requires the wider determinants of behaviour change to be considered. Social marketers need to look beyond a focus on individuals to all the entities that make up the market and that determine who has access to what resources, at what costs and when (Lefebvre, 2012). In a social marketing context, the marketing system of a social issue consists of “structures, actors, behaviours, motivations, values, activities and actions” and, as such, is influenced by “the political, cultural, social policy environment that impacts upon infrastructure, organisational structures and individual choices” (Domegan et al., 2016 p.1125). This requires social marketers to see the big picture and take a holistic view of the social problem to account for all the issues

and entities at play within the marketing system they are operating in (Hastings and Domegan, 2018).

A marketing system consists of a network of actors that are connected and interact within the system. These actors include government, commercial organisations, community groups and individuals and have potential to influence people's behaviours either at the macro, exo, meso or micro level. This network of actors influence both the physical and social environment of the social problem and, in doing so, have impact on individual behaviour. Brennan, Previte and Fry (2016, p.224) propose system actors engage "with each other in a network of acts, interactions and connections within the system". This suggests marketing systems are intrinsically relational and social marketers need to understand the relationships between actors in the system as these provide opportunities to influence social change. Social marketers looking to bring about long-term change in the marketing system of a social problem need to engage with a range of system actors to encourage and support the adoption of any change (Kemper and Ballantine, 2017).

Kennedy et al., (2017) propose that when analysing wicked problems the first step is to understand all the actors in the environment of the system and their drivers. By mapping out all the actors in the system it is possible to better understand the structure that is creating the problem and the interactions and connections between different actors in the system and their potential to change behaviour. The benefit of this systems-thinking approach to social marketing is it looks to create co-ordinated change across groups of interacting actors. Social marketing interventions need to take place simultaneously targeting individuals (micro level), communities (meso level), organisations (exo level) and governments (macro level) and consist of a combination of formal changes (e.g. to laws), informal changes (e.g. to social values and behaviours), and philosophical changes (e.g. to thinking within the system) in order to promote new "norms to all actors in the system" (Kennedy, 2016 p.359). All interventions need to be identified from within the system requiring engagement with the actors in the system (Parkinson et al, 2017).

The marketing systems approach can be applied to partnerships in social marketing as potential partners are a factor in the overall system of a social issue. Actors within a marketing system have the ability to interpret, change and disseminate norms within that system and, by doing so, can influence the behaviour of other actors in the system. Head and Alford (2015) suggest complex social problems are best addressed through cooperative approaches because collaborative relationships help enhance the understanding and tackling of wicked problems. Bryant et al. (2009) also support a collaborative approach to tackling complex social problems and recommend social marketers work with local community actors to create coalitions to support the development and implementation of community interventions. This view is supported by

Luca, Hibbert and McDonald (2015, p. 206) who see a collaborative approach as essential for sustainable system change as “relationships with network actors are fundamental to extending access to resources (e.g. other organisations), removing barriers to action (e.g. peer and family resistance) and building capacity for support (e.g. integrated services”. This suggests Partnerships could have a role in systems social marketing as the social marketing practitioner could work with partners within and across all levels of the marketing system to support behaviour change.

As previously noted, the field of social marketing has evolved over time and there has been an increase in the use of partnerships in social marketing programmes. However, the review of literature in this study highlighted a lack of empirical and theoretical research into partnerships in social marketing. As such, the search for relevant literature was opened up to include the wider business literature and here the topic of partnerships between organisations was found to be incorporated in the area of Inter-Organisational Relations, which is considered in the next section.

2.8 The relationship between partnerships and Inter-Organisational Relations (IOR)

Business research into the concept of partnerships between two or more organisations can be found in the broad literature area of Inter-Organisational Relations (IOR), which covers organisations from the private, public and third sectors (Cropper et al., 2008). As the name suggests IOR looks at the relationships between and among organisations and these relationships can be created by individuals within the organisations or by the organisations themselves. There appears to be no set language to describe these relationships in the IOR literature and the terms partnerships, alliances and networks are often used interchangeably. However, there are two core concepts that underpin all IOR research - organisations and the relationships between them (Cropper et al., 2008). It is suggested that organisations form relationships in order to work together on individual or common objectives while at the same time remaining autonomous and independent (Hibbert, Huxham and Smith Ring, 2008).

Academic research into IORs can be split into two distinct themes. The first theme focuses on the area of service relationships and treats the partnership itself as the outcome; it is an end in itself. The second theme focuses on the consequences of the relationship. Here, the partnership is viewed as an independent variable and as such a means to an end. The level at which the relationship occurs is also considered across both themes within the research. For example, four levels are identified within public sector partnerships – the policy level, the organisational level, the programme level, and

the client level (Sandfort and Milward, 2008). This could have implications for this study into the use of partnerships in social marketing as there is a need to develop greater understanding of the outcomes of partnerships and to see if these are related to the partnerships themselves and/or the social marketing intervention.

IOR research also covers relationships involving two or more organisations from different societal sectors working collaboratively to address complex social problems that are deemed too big for any one organisation to tackle on its own (Selsky and Parker, 2005; Clarke and Fuller, 2010). These complex social problems appear to have similarities with the “wicked problems” social marketers are looking to address. The IORs are termed multi-organisation cross-sector partnerships (CSSP) and are defined as “cross-sector projects formed explicitly to address social issues and causes that actively engage the partners on an on-going basis” (Selsky and Parker, 2005).

Similar to the evolution of the field of Social Marketing, research into the management of IORs has been found to be situated within one of the following categories:

- “Relatively micro-scale, e.g. day to day management practices
- Relatively macro-scale, e.g. external influences and management structures
- Intermediate (meso) scale, e.g. management processes” (Hibbert, Huxham and Smith Ring, 2008 p.393).

IORs have been developed across a range of operational areas including research and development, distribution, and marketing. As this research is an investigation into the use of partnerships in national social marketing campaigns the literature relating to Marketing IORs is of particular interest and will be reviewed in the next section.

2.8.1 The role of Marketing IORs

There has been an increasing trend for Marketing IORs between organisations, but these can take very different forms depending on the purpose for which they are set up (Reid et al., 2008). Marketing IORs are broadly defined as “agreements between two [entities] who may agree to cooperate in a variety of ways” (Becherel and Vellas, 1999 p.17). Examples include marketing partnerships between McDonalds and Coca Cola, Samsung and Armani, and Nike and Apple. Marketing IORs can differ from other types of IORs as marketing partnerships tend to operate much closer to the final customers/consumers (Agostini and Nosella, 2017). Marketing IORs appear to be particularly useful when the key competitive advantage comes from understanding the needs of customers through marketing activities (Lee and Chang, 2014).

Agostini and Nosella (2017) undertook an extensive review of the academic literature relating to Marketing IORs and identified a number of reasons why organisations enter into Marketing IORs including: accessing new markets and reducing costs (Kale and Singh, 2009; Ring and Van de Ven, 1994), supporting joint brand initiatives (Das et al., 1998), improving competitiveness and giving the opportunity to compete in divergent and larger markets (Dennis, 2000). Agostini and Nosella (2017) created a theoretical framework of analysis to help structure their findings and this is pictured in Figure 5 below:

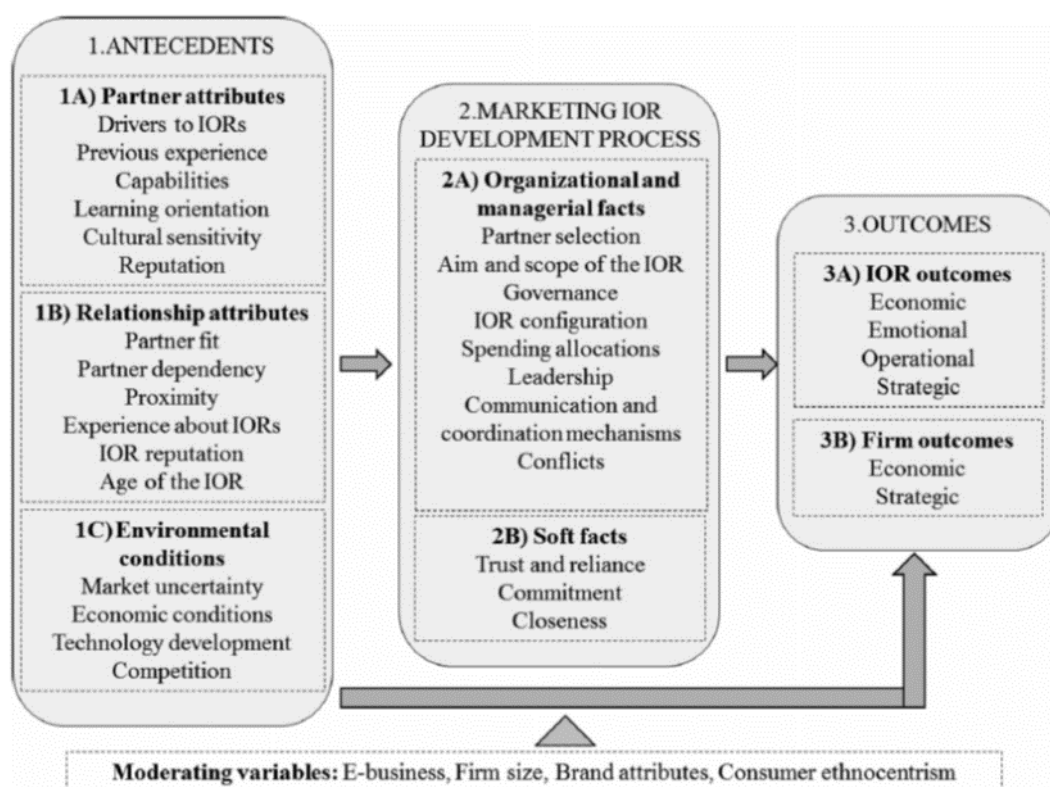


Figure 5: Marketing IOR Research Framework - Source: Agostini and Nosella (2017, p.134)

This framework identifies three distinct areas that have been the subject of interest for researchers investigating Marketing IORs. These are:

- Antecedents – defined as “something that happens or occurs before something else” (Agostini and Nosella, 2017 p.134). For Marketing IORs, antecedents refer to the inherent properties of the relationship that might impact the management, organisation, and outcome of the partnership (Botha and Van der Waldt, 2010). This can include partner attributes including reputation; relationship attributes such as “partner fit”; and environmental conditions, for example the economic situation.
- Marketing IOR development process – includes both the decisions taken and the activities carried out when starting and managing a partnership plus aspects relating to the people involved. Partner selection is seen as the most important step in partnership development (Chen and Tseng, 2005) along with the

governance mechanisms put in place (Young et al., 1996), the presence of leadership (D'Angella and Go, 2009) and the communications process (Voss et al., 2006).

- iii. Outcomes – include both the IOR outcomes and the organisational outcomes.

Agostini and Nosella's (2017) research focused on Marketing IORs in a commercial context, which are likely to have financial or organisational objectives, as opposed to a social marketing context, which will have a behaviour change objective. So it cannot be assumed that their framework will translate exactly to partnerships in social marketing. However, the three Marketing IOR research areas identified by Agostini and Nosella (2017) do correspond to gaps in the academic literature on partnerships in social marketing identified in this research. These include: the lack of understanding of the antecedents relating to why partnerships are used in social marketing and how they link to theory in behaviour change; the absence of knowledge regarding the development process of creating and maintaining successful partnerships in social marketing; and the need for clarity on the outcomes of partnerships in social marketing and particularly how these are measured. As the overarching objective of this study is to generate a greater understanding of the use of partnerships in national social marketing campaigns by to develop knowledge of why partnerships are created, how they are created and what the outcomes of the partnerships are, the Agostini and Nosella (2017) findings of antecedents, IOR development process and outcomes provide a useful framework for an investigation into the use of partnerships in national social marketing campaigns.

The next section of this chapter will review the theories identified in section 2.7 above in light of the Marketing IOR Research Framework developed by Agostini and Nosella (2017).

2.9 Review of theories relating to social marketing in light of Agostini and Nosella's framework

In section 2.7 above, four theories were identified that have been applied in relation to social marketing. These are: Exchange Theory, Relationship Marketing, Value Co-creation, and Marketing Systems. Agostini and Nosella (2017) identified three areas of research with regards to Marketing IORs - Antecedents, IOR Development Process, and Outcomes. This section reviews the literature that relates to the four theories again in light of these three areas of IOR research to understand any links between them.

Exchange Theory is integral to social marketing and marketing in general. The concept of exchange with regards to partnerships in social marketing can be applied to the

antecedents of partnerships, the partnerships development process, and the outcomes of partnerships. For example, the adoption of exchange theory in social marketing takes place prior to the partnerships being created and as such is an antecedent. In addition, how the exchange takes place is part of the partnerships development process. Finally, the completion of the exchange is an outcome of the partnership.

The use of Relationship Marketing in social marketing implies the adoption of a more long-term, relational approach to behaviour change. The concept of Relationship Marketing with regards to partnerships in social marketing can be applied to the antecedents of partnerships, the partnerships development process, and the outcomes of partnerships. Both Morgan and Hunt (1994) and Duane (2012) identified components of relationships that represent antecedents and outcomes, for example, both identified Shared Values as an antecedent and Co-operation as an outcome (see Figures 3 and 4 above). In addition, taking a relational approach to social marketing involves developing a long-term relationship with partners, as well as the target audience.

The idea of value creation is a core component of social marketing and commercial marketing. The concept of Value Co-creation in relation to partnerships in social marketing can be applied to the antecedents of partnerships, the partnerships development process, and the outcomes of partnerships. For example, practitioners adopting Value Co-creation as an approach to social marketing will have made this decision prior to the creation of partnerships and so it is an antecedent. In addition, social marketing practitioners can co-create value with the partners, as well as the target audience, and so it is part of the partnerships development process. Finally, the actual co-creation of value is an outcome of partnerships in social marketing.

Taking a Marketing Systems approach to social marketing requires seeing the big picture and understanding the wider determinants of behaviour change. The concept of Marketing Systems applied to partnerships in social marketing, can be employed to the antecedents of partnerships, the partnerships development process, and the outcomes of partnerships. For example, social marketing practitioners need to understand the wider determinants of behaviour and the part potential partners play in this and so it is an antecedent. In addition, social marketing practitioners can work with a network of partners to try and change the Marketing System to support behaviour change in the target audience and so it is part of the partnerships development process. Finally, creating a network of partnerships is an outcome.

The four identified theoretical approaches applied to social marketing and the Agostini and Nosella (2017) Marketing IOR framework appear to support research into partnerships in social marketing. The review of literature in this study identified gaps in relation to

partnerships in social marketing that justify a need for further research into this area and this will be presented in the next section.

2.10 The need for further research into partnerships in social marketing

This research adopts a Critical Realist philosophy and follows an abductive research design. The main objective of the study is to generate a greater understanding of the use of partnerships in national social marketing campaigns, through the discovery of new knowledge about partnerships in social marketing, to contribute to both knowledge and practice. The abductive approach makes use of existing literature to guide the research but also allows for new concepts to be developed from the research. Following this approach accepts that there are “known unknowns” and “unknown unknowns” with regards to partnerships in social marketing. The review of literature has identified the “known unknowns” and these will be presented and justified in this section. However, it was anticipated that there might be “unknown unknowns” that might come out of this study.

As noted in section 2.4 above, a number of academics have identified the need for further research into partnerships in social marketing, for example Niblett (2005), Lefebvre (2006), and Duane (2012), even though their usage and importance in social marketing practice has grown. In particular, Beall et al. (2012) conducted research within the social marketing community to identify future trends, issues, and opportunities. Their findings highlight a need for further research into the benefits of partnerships and collaboration. They argue that at a time of growing social need around the world and diminishing public-sector resources it is critical that social marketers work effectively with private sector organisations “as true and invested partners” (Beall et al., 2012 p.114). More recently, Duane and Domegan (2019, p.186) identified the need for further research into the “development, implementation and evaluation of social marketing partnerships” to gain a greater understanding of their “scope” and “substance” (Duane and Domegan, 2019 p.170).

The literature review in this study identified a lack of empirical research into partnerships in social marketing and, although certain elements of partnerships in social marketing are identified, the content appears to be focused on the use of partnerships to support the social marketing mix in micro-level social marketing campaigns. This demonstrates the need for further research to generate a deeper understanding of the concept of partnerships in social marketing at a more macro-level and as part of a marketing system. Partnerships as a concept is highly relevant to the study of social marketing but has

received little academic attention. A rationale for the use of partnerships in social marketing and the theories being applied to social marketing has not been explored leaving the justification for why partnerships are used and the process of how partnerships are created as unclear.

To meet the objective of this research to generate a greater understanding of the use of partnerships in national social marketing campaigns, and incorporate the abductive research design, a macro-view was taken to the development of the primary research question (RQ1) in this study to incorporate existing ideas from the literature and new ideas from the data. This is as follows:

RQ1 - How can partnerships contribute to national social marketing campaigns?

This macro-level research question looks to understand the bigger picture of partnerships in social marketing. To support the advancement of understanding at this macro-level it was necessary to focus down on a number of key factors. To achieve this, the review of literature was used to identify gaps in understanding of partnerships in social marketing. Firstly, the absence of an agreed definition of partnerships in relation to social marketing was identified. Without an agreed definition of partnerships in this case study it is not possible to understand partnerships as a concept in social marketing and this informed the second research question as follows:

RQ2 – How might partnerships be defined by an executive government agency in their national social marketing campaigns?

Secondly, the review of literature highlighted gaps in understanding with regards to the why, how, and what of partnerships in social marketing. There is a need for more clarity regarding why partnerships are used in social marketing and how they link to theory in behaviour change. Partnerships are increasingly being used in social marketing interventions but there is need for a clearer rationale for their use and the role they can play across the different approaches of micro, meso, and macro-social marketing. This informed the third research question, which is outlined below.

RQ3 - Why are partnerships created and maintained to support national social marketing campaigns?

Thirdly, there is a need for greater explanation of how successful partnerships are created in social marketing and how relational partnerships are maintained to achieve their long-term aims. This requires further research into the management of partnerships in social marketing and the processes involved in their creation and maintenance. This informed the fourth research question, which is provided below.

RQ4 - How are partnerships created and maintained to support national social marketing campaigns?

Finally, the review of literature identified a lack of research and understanding of the specific outcomes of partnerships in social marketing, both in relation to the social marketing campaigns they have been used in and the partnerships themselves. This requires further research into the actual outcomes of partnerships in social marketing and this informed the fifth research question as follows:

RQ5 - What are the outcomes of partnerships in national social marketing campaigns?

By undertaking research into the four sub-questions (RQ2, RQ3, RQ4 and RQ5) this study aims to generate a greater understanding of the primary research question (RQ1) to advance knowledge and practice of partnerships in social marketing. In addition, this study follows an abductive research design to encourage new findings from the data that cannot be anticipated from the review of literature alone.

2.11 Concluding remarks to this section

This chapter started by reviewing the academic literature relating to social marketing and specifically partnerships in social marketing. Although partnerships have been used widely across social marketing programmes, gaps were identified in the academic research into this concept. Specifically, an absence of theoretical understanding of the concept of partnerships in social marketing was identified along with the lack of an agreed definition of partnerships. This lack of research is particularly important as social marketing has evolved from its initial focus on individual behaviour change at the micro-level to a more holistic approach with an emphasis on community/nationwide interventions at the meso/macro-levels to create an environment that enables social change. A number of theoretical approaches have been put forward for consideration in social marketing to achieve change for social good including: exchange theory; relationship marketing; marketing systems; and co-creation of value. Partnerships may have a role to play in the application of these theories in social marketing and this study will look to develop insight that impacts knowledge in relation to the concept of partnerships and one or more of these theoretical approaches to social marketing.

The next chapter of this thesis will outline the methodology used to undertake this research.

Chapter 3

Methodology

3.1 Introduction

This study is a case study inquiry. It adopts a Critical Realist ontology, a qualitative methodology and utilises thematic analysis to investigate the use of partnerships in social marketing with a focus on developing insight that impacts knowledge. The objective of this study is to generate a greater understanding of the use of partnerships in national social marketing campaigns from the perspective of people involved in the partnerships by taking an ethnographic approach that includes the use of three intensive research methods - observation, documents, and face-to-face interviews. Emphasis is placed on developing causal explanations that are of value to both academics and practitioners, by bridging the identified gap in theoretical understanding of the concept of partnerships in social marketing and developing practical insight into the creation and maintenance of partnerships in national social marketing campaigns.

This methodology chapter offers justification for the ontological, epistemological, and methodological stance adopted. The chapter starts by identifying the theoretical underpinnings that provide justification for all the decisions made in relation to methodology. It sets out the problem that defined the study, framed within a case study approach, and explains how this approach is a methodology in its own right, rather than simply a data collection tool (Yin, 2018). This is followed by a description of how the research was carried out together with an explanation of how the decisions made within the research were influenced by the Critical Realist philosophical position adopted by the researcher and considered at all times during the research process. Finally, there is an explanation of the data collection methods and timeline.

3.2 Research perspective

An essential starting point for any research project is to give consideration to the philosophical assumptions made by the researcher and to understand and explain the position taken as “for a researcher, ontology and epistemology are important because they have consequences for the possibilities and limits of research methods, techniques, and analyses that they employ” (O’Mahoney and Vincent, 2014 p.1). A researcher’s ontological perspective is defined by their assumptions about how the social world is, whilst their epistemological perspective is based on their assumptions of how we can come to know the social world (Easton, 2002).

A Critical Realist methodological framework is used to guide this research, and this impacts all the decisions and choices made with regards to the research strategy and the research design. The researcher started the study with a belief that the partnerships created as part of national social marketing campaigns were real entities and, although these partnerships were social constructs, they could cause events to take place and, by doing so, could have an influence on the people involved in the creation and maintenance of the partnerships. In contrast, the researcher could have taken the perspective that there are multiple realities, each one a construct of the individual, and set out with a belief that the partnerships were not real entities but social constructs (see section 2.4 of this chapter for an explanation of this “Constructionist” perspective).

Having reviewed the various philosophical approaches to social research it was determined that the Critical Realist perspective of ontological realism best fitted with that of the researcher’s own viewpoint as it holds a belief that business relationships are real entities and events can take place when the mechanisms of these entities become activated (Ryan et al., 2012). This was the research perspective held throughout this study.

From a research perspective, Critical Realists believe that human knowledge represents only a small part of a much larger reality. Critical Realists adopt a “stratified” ontology that assumes three levels of human knowledge – the Real Level, the Actual Level, and the Empirical Level (Bhasker, 1978). The Real Level is whatever exists, natural or social, regardless of whether we have an adequate understanding of it. Within the Real Level are objects that have structures with causal powers, giving them capacity to behave in particular ways, and causal liabilities, giving them specific susceptibilities to certain kinds of change (Sayer, 2000). The Actual Level refers to the domain where those causal powers and liabilities are activated and where change takes place. The Empirical Level is where observations can be made and experienced by researchers. This perspective on the theory of knowledge is referred to as epistemic relativism with regards to the generation of knowledge. This means that all knowledge is seen as fallible as it can only be known in terms of the Empirical Level and not the Real Level.

Critical Realism views the three levels of human knowledge as being part of the same entity and, as such, each level interacts with the other two levels and the causal mechanisms that take place at the Real Level can exist at the Empirical Level and so can be understood by investigation at the Empirical Level (Sayer, 2000). Research at the Empirical Level has been likened to “seeing the tip of the iceberg” because even though three-quarters of it is invisible this does not mean it is not there or unconnected to what we see (Easton, 2010). This view of ontology taken in Critical Realism has been illustrated by Saunders, Lewis and Thornhill (2019) as can be seen in Figure 6 below.

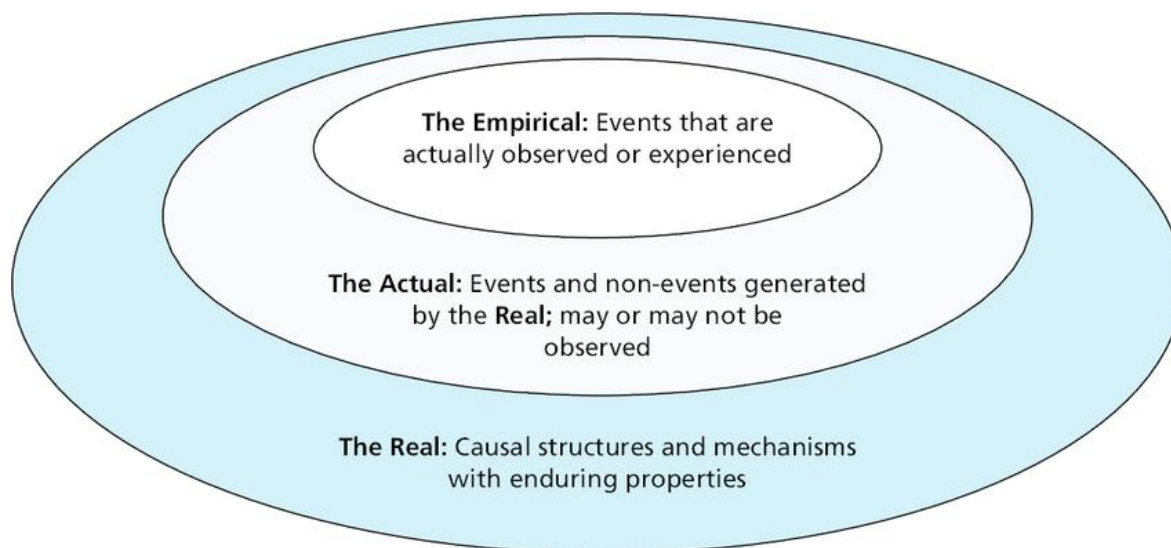


Figure 6 - The Critical Realist Stratified Ontology - Source: Saunders, Lewis and Thornhill (2019, p.148)

The aim of this study is to develop findings at the Empirical Level that can shine a light on what is causing events to take place at the Actual Level, for example, how are partnerships created and what are the outcomes. The fallibility of the findings is recognised and, appreciating this fallibility, the research strategy aims to go beyond surface observations by looking for the details that might build explanatory knowledge. To support this an abductive approach was developed that placed equal value to both existing theory and empirical data. For example, the academic literature relating to Partnerships in Social Marketing and Inter Organisational Relations (IOR) is used to support the development of the research questions and to inform the research design and data analysis (see Table 2 in Section 3.11.6 below for details).

The Critical Realist view of ontology is of crucial importance to the design of this research and is explained in the next section.

3.3 Why Critical Realist ontology?

This research seeks to generate a greater understanding of the use of partnerships in national social marketing campaigns with the aim of developing insight to build knowledge. Partnerships involve relationships between two or more organisations and the study of them requires a philosophical approach that encourages their complexity to be captured. Critical Realism was deemed to provide this as it is designed not to “untangle the weave, but in keeping the tangle and looking at the patterns it produces” (Goerner, 1999 p.138). This philosophy of how the world is seen impacted this study by encouraging the researcher to view, and study, the partnerships as real entities of dynamic processes and by pointing the attention of the research to not only the events that take place but also

to the bundle of mechanisms behind them to support an explanation of why these processes take place (Ryan et al., 2012).

While Critical Realism is a relatively new research philosophy there appears to be a growing use of it in the study of business relationships (see Morais, 2010; Mouzas, 2004; Ryan and O'Malley, 2006; Sousa and Castro, 2010) as well as in other social science disciplines including economics (Lawson, 1997), sociology (Sayer, 2000), ecology (Trosper, 2005), environmental studies (Bania, 1995) and management (Ackroyd and Fleetwood, 2004).

In practice, research into the social world is a messy process where it is difficult to anticipate and control all aspects of the investigation. However, Critical Realism has been proposed as “a philosophy of and for the social sciences” (Sayer, 2000 p.32) because it does not view the social world as static but instead treats structures such as business relationships and partnerships as complex, open systems that are constantly changing due to human activity. The study of these systems requires a research philosophy like Critical Realism that supports the critical examination of their structures over a period of time in their natural setting rather than an approach that tries to isolate out certain components and examine them using controlled conditions, as in other natural sciences (Sayer, 2000).

Further justification for adopting a Critical Realist ontology comes from the work of Easton (2002) who proposed Critical Realism as being appropriate for research in the marketing discipline, particularly studies looking at exchange relationships. He also suggested a Critical Realist perspective could support the development of new forms of research, theory, and teaching in marketing. In addition, Ryan et al. (2012) promoted Critical Realism as being apposite in the study of business relationships and networks. As such, the Critical Realist perspective is an appropriate underpinning for this study because it views partnerships as complex, ever-changing social systems and promotes a research approach that goes beyond surface observations.

3.4 Critical Realism versus Positivism and Constructionism

There is a wide spectrum of viewpoints amongst social scientists as to how the study of the social world could and should be undertaken and as such there is no single methodological approach to social research. Instead, the “methods of social research are closely tied to different visions of how social reality should be studied” (Bryman, 2008 p.4) and as such social research can adopt ontologically, epistemologically, and methodologically distinct positions. Critical Realism has emerged out of the positivist/constructionist ‘paradigm wars’ of the 1980s (Denzin and Lincoln, 2011).

Positivism sits at one end of the philosophical spectrum and promotes the belief in one reality that can be studied using the methods of the natural sciences. Positivism suggests a static social world with law-like structures that can be tested through research. At the opposite end of the spectrum is Constructionism that holds a belief in multiple realities constructed by social actors. Constructionism suggests no single explanation of the social world can be possible as all research involves social construction (Bryman, 2008). Critical Realism aims to provide researchers with a middle ground by incorporating elements of each approach but also rejecting key points of conflict. Critical Realists, unlike Positivists, accept that people perceive their own realities but unlike Constructionists, Critical Realists believe there is only one actual reality, which exists independently of people's perceptions. This double recognition sets Critical Realism apart from other philosophical approaches (O'Mahoney and Vincent, 2014).

There are four key aspects of a Critical Realist methodology that are unique from other research philosophies. Firstly, Critical Realists are concerned with ontology (theoretical assumptions of the social world) and take the view that ontology is not reducible to epistemology (theoretical assumptions of knowledge of the social world). Critical Realists believe human knowledge only represents a small part of a much larger reality and, as such, research of the social world needs to be guided by ontology not epistemology. This viewpoint sets Critical Realism apart from Positivism and Constructionism, which are both guided by epistemology and so reduce reality "to human knowledge, whether that knowledge acts as lens or container for reality" (Fletcher, 2017 p.182). As such the Critical Realist ontological view is of crucial importance to research design.

Secondly, Critical Realism adopts an alternative approach to the use of theory in research to those that are utilised in Positivism and Constructionism. Positivist studies generally take a deductive approach where theory is used to develop propositions that can be tested via research. Constructionist studies generally take an inductive approach where theory is not used to develop the research but instead is generated out of the research (Bryman, 2008). Critical Realists propose a third and promote the use of an abductive approach, which places equal weight to both existing theory and empirical data as a way to develop knowledge. An abductive approach is particularly useful when the aim is to generate a greater understanding of a phenomenon and to identify new things (Dubois and Gadde, 2002) and this provided justification for its use in this research. An abductive approach was taken in this study, for example, in defining the research problem (see section 3.5 of this chapter), in the development of the research methodology (see section 3.7 of this chapter), in the development of the questions for the face-to-face interviews (see section 3.11.7 of this chapter), and to support the data analysis (see section 3.12 of this chapter).

Thirdly, Critical Realists believe the process of data analysis should be conducted using retroduction, which has much in common with abduction. Retroduction means “moving backwards” and this is what the process involves. It is a “mode of inference in which events are explained by postulating (and identifying) mechanisms which are capable of producing them” (Sayer, 1992 p.107). Critical Realists believe social structures possess causal powers and liabilities and by undertaking the process of retroduction a researcher can investigate particular social conditions under which a causal mechanism can take effect (Fletcher, 2017). Retroduction was undertaken in this study, for example, through the use of multiple research methods, which provided the opportunity to go back and forth between the data collected from the different methods to see where there was agreement and discrepancy (see section 3.9 of this chapter), and during the coding of the data (see section 3.12.3 of this chapter).

Fourthly, Critical Realism emphasises the use of intensive research methods. It is not tied to any one research design and as such is compatible with a relatively wide range of intensive research methods. Intensive methods focus on the individual in context by using interviews, ethnography, and qualitative analysis, with the aim of gaining an understanding of what produces change (Easton, 2010). The choice of research methods then depends on the nature of the object of study and what it is the researcher aims to learn about it (Sayer, 2000). Three intensive research methods were utilised in this study and these are presented and explained in section 3.11 of this chapter.

By utilising abduction, retroduction and intensive research methods, a Critical Realist methodological approach aims to capture the complexity of the social world and there is a belief that through this approach to research, reliable explanations of social life can be developed (Ackroyd and Karlsson, 2014). Critical Realists suggest there is a clear distinction between theory development and theory generation (Dubois and Gadde, 2002). Critical Realists develop knowledge by employing an abductive research design that, on the one hand, encourages the researcher to utilise theoretical concepts to collect a certain kind of data but does not restrict the data collection to just that type of data. On the other hand, the abductive research design supports the use of collected data to guide the search for theoretical concepts that help the researcher understand and explain unexpected issues that arise from the data (Ryan et al., 2012).

By utilising abduction, Critical Realists typically start the design of their research by setting out the research problem or question that has been guided by theory (Fletcher, 2017). This is the approach taken in this study and the research problem is defined in the next section.

3.5 Defining the problem

Following a Critical Realist approach, abduction was used to define the research problem in this study. The literature review identified the research problem as a lack of academic research into the concept of partnerships in social marketing. More specifically, it was identified that there was a need for greater understanding of how partnerships might be defined in social marketing, why partnerships are created and maintained in social marketing, how partnerships are created and maintained in social marketing, and what the outcomes of partnerships are in relation to social marketing.

The research problem was further refined during the study as new research emerged in the academic literature (for example – Duane and Domegan, 2019). Updating the research problem to reflect new research demonstrates the Critical Realist approach taken in this study and the commitment to abduction. There was recognition that this study needed to contribute to the newly identified gap in knowledge with regards to the development, implementation, and evaluation of partnerships in social marketing. The research problem was updated to focus on the need to generate knowledge of the antecedents, development process, and outcomes of partnerships in national social marketing programmes. In addition, abduction was followed by accepting that there may be factors related to partnerships in social marketing that are as yet unknown and so cannot be identified as gaps in the literature. This approach can be seen in the research objectives and questions below.

3.6 The research objectives and questions

As noted above, the research problem was identified as a lack of academic research into partnerships in social marketing. Critical Realists develop research objectives and research questions that help to address the research problem. This research followed an iterative process with regards to the development of the research objectives and questions. In line with an abductive approach, the development of the research objectives and questions reflect the theories identified in the literature review but also allow for an openness to discovering new things in the study. Thus, the starting point for this study was an investigation into the broad area of the use of partnerships in social marketing and this is reflected in the research objectives as follows:

RO1 – To generate a greater understanding of the use of partnerships in national social marketing campaigns.

RO2 - By meeting RO1, to develop insight into the use of partnerships in national social marketing campaigns that can have impact on knowledge and practice in social marketing.

Stake (1995) suggests that one of the toughest tasks for a researcher is to generate good research questions. One approach taken in qualitative research is to begin the study with a broad overarching research question to guide the process of inquiry (Agee, 2009; Swaminathan and Mulvihill, 2017; Kross and Giust, 2019). Subsequently, during the course of the research, further sub-questions are developed that narrow the focus of the overarching question. These sub-questions generally flow from each other and concentrate the research on the why and how of the phenomena of interest (Agee, 2009; Swaminathan and Mulvihill, 2017; Kross and Giust, 2019). This was the approach taken in this study. To meet the research objectives an overarching research question (RQ1) was generated at the beginning of the project to provide context and act as a guide for the study and this is as follows:

RQ1 - How can partnerships contribute to national social marketing campaigns?

To provide the study with greater focus the literature review was used to identify distinct areas of partnerships in social marketing that would support the advancement of understanding with regards to RQ1 and required further research to be undertaken. Four areas were highlighted: (i) the need for a definition of the concept of partnerships in social marketing; (ii) the need for a greater understanding of why partnerships are being created and maintained in social marketing; (iii) the need for clarity on how partnerships are being created and maintained in social marketing; and (iv) the need for a greater understanding of the outcomes of partnerships in social marketing. Four research sub-questions were then developed to investigate these areas as follows:

RQ2 – How might partnerships be defined by an executive government agency in their national social marketing campaigns?

RQ3 - Why are partnerships created and maintained to support national social marketing campaigns?

RQ4 - How are partnerships created and maintained to support national social marketing campaigns?

RQ5 - What are the outcomes of partnerships in national social marketing campaigns?

Alvesson and Sandberg (2013) identify a hierarchy of research questions consisting of four types – descriptive, comparative, explanatory and normative. The most basic questions are descriptive, or first-order, and these aim to uncover what makes up a

phenomenon. The next level up are comparative, or second-order, questions that aim to generate an understanding of relations between phenomena. Next are explanatory, or third-order, questions that produce knowledge concerning the contingent relations between phenomena. The highest order research questions are normative questions that aim to generate knowledge about how something should be done. Alvesson and Sandberg (2013) propose that developing knowledge through higher order research questions often first requires generating answers to lower order questions and this is the case in this study where RQ1 could only be investigated once RQ2, RQ3, RQ4 and RQ5 had been answered.

RQ2 is a descriptive question that aims to find out how the phenomenon of partnerships is defined by PHE and the people involved in creating the partnerships. RQ3, RQ4 and RQ5 are explanatory questions that aim to generate knowledge of the why, how, and what of partnerships. Finally, RQ1 is a normative question that can only be investigated once an understanding of the four sub-questions has been generated.

The research methodology for this study was designed to meet the research objectives and support the collection of data that could generate greater understanding of the research questions to advance knowledge and practice. The research methodology is described and explained in the next section of this chapter.

3.7 Research methodology

An abductive approach was taken to the methodological development of this study with case study research theory being used to support the decision to utilise it as a methodology. Yin (2018) makes the point that case study research is a methodology in its own right rather than simply a research method. Critical Realists are not tied to any one methodological approach to research. However, case study research has been put forward by a number of academics as the most appropriate approach to take in Critical Realist research (Easton, 2002; Halinen and Tomroos, 2005; Ryan et al., 2012; Ackroyd and Karlsson, 2014). Easton (1995, 2002, 2010) has promoted the unique value of utilising case study methodology to support Critical Realist research. Easton (2010) justifies this by suggesting case study research provides the opportunity to interrogate a complex set of elements and relationships, albeit in one or a small number of instances and states “a critical realist case approach is particularly well suited to relatively clearly bounded, but complex phenomena such as organisations, interorganisational relationships or nets of connected organisations” (Easton, 2010 p.123).

A Critical Realist research methodology is concerned with causal explanation – identifying and explaining the cause behind an event. This can be achieved by employing two

intertwined activities – “firstly, a description of empirical things and events (often in research itself) and secondly, an analysis that theorises the mechanisms that generate these” (O'Mahoney and Vincent, 2014 p.11). The implication here is that an overarching strategy for Critical Realist research is to develop knowledge and develop theory to provide causal explanation. Critical Realists do not expect to build theory from scratch and use abduction as a way to build on existing theory or identify factors not covered by existing theory. A Critical Realist research strategy places equal weight to both the role of existing theory and the role of empirical data. As such, theory can be developed “a priori from existing alternative theories or posteriori from the data” (Ryan et al, 2012 p.302).

3.8 Case study research

The promotion of case study research in Critical Realism could be seen as surprising as the case study approach has not always been regarded as a proper research method let alone a key research methodology (Dubois and Gadde, 2002). The main criticism of case study research is that by investigating a single case, or a small number of cases, the findings cannot be trusted for generalisation because of the constraint of low, statistical representativeness. However, this criticism comes from the Positivist, inductive logic of research in the social sciences and is based on the view “that there exist regularities or law-like generalisations in material or social settings that provide the basis for both explanation and prediction” (Easton, 2010 p.118). Critical Realists do not accept this Positivist view of the social world but instead view all knowledge as fallible. Critical Realists conduct research not to identify regular occurrences of events for generalisation but instead with the aim to develop knowledge that can then undergo further empirical testing. Case studies can be generalisable to theoretical propositions and are not designed to represent a “sample” but to support the goal of developing and generalising theories (analytical generalisation) rather than counting frequencies (statistical generalisation) (Yin, 2018). There is no requirement in case study research to compare the case of interest with other cases, although by developing insight into one case this may help in understanding other cases (Stake, 1995). In addition, Critical Realist research follows an abductive approach and, by investing in both theory and empirical data, Critical Realists believe they can improve the explanatory ability of case studies and this provides justification for their use.

What Positivists see as a problem with case study research Critical Realists see as an opportunity. The case study can provide an opportunity to identify the operation of a mechanism or process in context through empirical methods and the in-depth nature of case study research allows for a focus on causation.

3.8.1 What is case study research?

Stake (1995, p.xi) defines case study research as “the study of the particularity and complexity of a single case, coming to understand its activity within important circumstances”, whilst Yin (2013, p.231) sees the case study as “an in-depth inquiry into a specific and complex phenomenon (the ‘case’), set within its real-world context”.

3.8.2 Why is case study research appropriate for this study?

Yin (2018) proposes a set of criteria to use when deciding on using case study research - (i) a “how” or “why” question is being asked; (ii) there is a contemporary set of events; and (iii) the researcher has little or no control over these events. This study meets all these criteria - it has a “how” research question and is an investigation into a contemporary set of events that the researcher has little or no control over. Eisenhardt and Graebner (2007) promote case study research as a good approach in addressing “how” and “why” questions, particularly in relatively unexplored research areas. Dubois and Gadde (2002, p.555) identify that case studies provide unique means of generating understanding by “utilising in-depth insights of empirical phenomena and their contexts”. The richness of data that a case study approach can produce supports the development of knowledge that “is accurate, interesting and testable” (Eisenhardt and Graebner, 2007 p.25). In addition, when there is limited existing theory in respect to a particular phenomenon, as is the situation in this study, research into one case can be enough to start the development of a theoretical contribution (Easton, 2010). Critical Realists consider learning from a single case to be a strength not a weakness (Dubois and Gadde, 2002).

3.8.3 What kind of case?

In case study research the case is defined by its focus and its boundary. In effect, the case is the unit of analysis (Miles, Huberman and Saldana, 2014). In this study, the focus of this case is the PHE Marketing Directorate and the boundaries are the organisations with whom PHE created partnerships with and the Partnerships agency who support PHE in the creation and maintenance of these partnerships. The rationale for this will be presented and discussed in more detail in the next section of this Chapter. Being clear on the boundaries of the case is key to providing rigour in a case study methodology and presenting the unit of analysis within its ‘bounded context’ avoids a study being too broad or having too many objectives (Miles, Huberman and Saldana, 2014 p.28).

In order to implement case study research a “setting” is required for the study.

Hammersley and Atkinson (2007, p.32) define a setting as “a named context in which the phenomena occur that might be studied from any number of angles, a case is those

phenomena seen from one particular angle". Eisenhardt and Graebner (2007) propose the use of theoretical sampling when utilising case study research to develop knowledge that has potential to make a theoretical contribution. They believe this to be a more appropriate approach than random or stratified sampling. In theoretical sampling the case is selected for theoretical reasons, for example because it is unusually revelatory, it is an extreme example, or it provides an opportunity for unusual access. Hammersley and Atkinson (2007) suggest that on occasions the setting for the research may come first and that an opportunity may arise where the study of an interesting situation is presented such as when the setting is an organisation that is the researcher's place of work.

3.8.4 The case setting

The setting for this case study research is the Marketing Directorate within the organisation Public Health England (PHE). PHE is an executive agency of the Department of Health and Social Care and is a unique organisation in England with operational autonomy. Since its formation in 2013, the Marketing Directorate at PHE has been involved in developing and managing national social marketing campaigns in England and, as part of these campaigns, it has been creating and maintaining partnerships. As such, PHE's Marketing Directorate provided a unique setting to conduct case study research into the use of partnerships in national social marketing campaigns. Choosing the PHE Marketing Directorate as the setting provided the opportunity to conduct research with people who had experience and knowledge of partnerships in social marketing. In addition, the researcher was employed in the PHE Marketing Directorate for five years from April 2013 to April 2018 and was provided with unique access to potential research participants. This met with Hammersley and Atkinson's (2007) assertion above that an opportunity may arise such as an organisation that is the researcher's place of work. The role of the researcher will be discussed further in section 3.9 of this chapter.

As noted above, the focus of this case is the PHE Marketing Directorate and the boundaries are the organisations with whom PHE created partnerships with and the Partnerships agency who support PHE in the creation and maintenance of these partnerships. The potential research participants were people employed in the PHE Marketing team, the Partnerships agency and the partner organisations who had experience and knowledge of the partnerships created by PHE.

The study took place (on a part-time basis) over 72 months between October 2014 and September 2020. During this time five social marketing campaigns were observed – Change4Life, Stoptober, Be Clear on Cancer, Act FAST, and One You. The key milestones of the research are outlined in Figure 7 below:

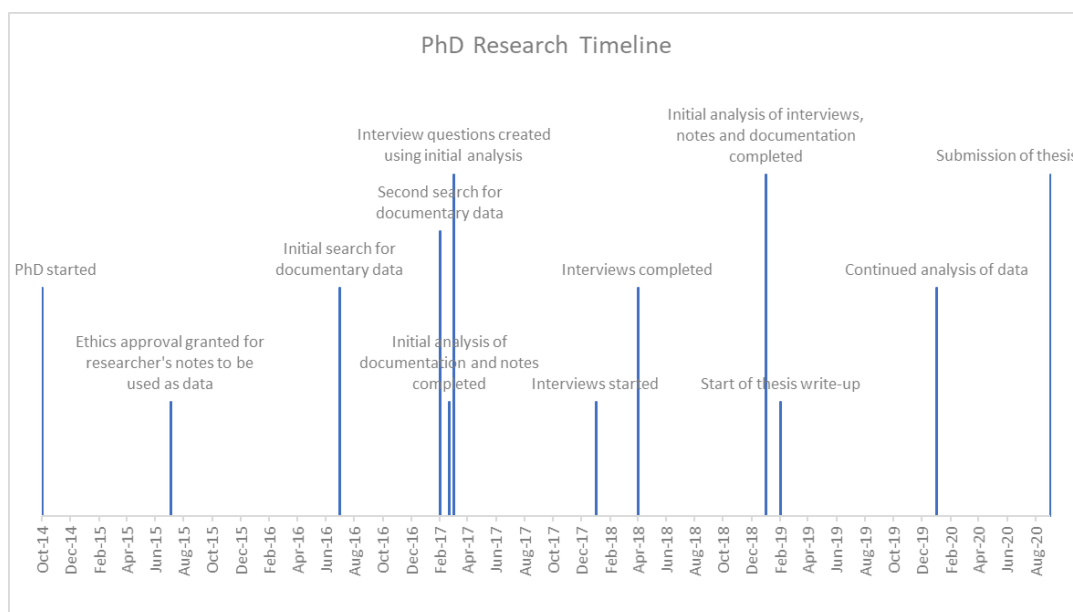


Figure 7: Research Timeline with Milestones

3.9 How does this study approach case study research?

This study adopts an ethnographic approach to case study research, which Stake (1995, p. 8) describes as “placing an interpreter in the field to observe the workings of the case”. An ethnographic approach was selected as it provides the opportunity to collect data utilising a range of intensive research methods, a core element in the Critical Realist approach to research, and it is an approach that is well suited to research that is concerned with producing descriptions and explanations of a particular phenomenon, in this case the use of partnerships (Hammersley and Atkinson, 2007). These reasons provided justification for taking an ethnographic approach and focused the research design on identifying sources of data that could help generate a greater understanding of why and how PHE create and maintain partnerships and what the outcomes of these partnerships are.

This study adopts the Critical Realist belief that in-depth analysis in case study research is aided by the use of multiple research methods. Multiple methods support retrodution (Kessler and Bach, 2014), which Critical Realists use to expand understanding “by constantly going ‘back and forth’ from one type of research activity to another and between empirical observations and theory” (Dubois and Gadde, 2002 p.555). Findings in case study research are likely to be more accurate and more credible if they are based on a number of different data sources as this supports the triangulation of data in the identification of patterns (Yin, 2018). Triangulation has been put forward as a way of enhancing the validity of social research. Bryman (2008, p.700) defines triangulation as “the use of more than one method or source of data in the study of a social phenomenon

so that findings may be cross-checked". From a Critical Realist perspective, the logic of triangulation is that complementary insights into the same empirical phenomenon can be obtained by combining different research methods (Modell, 2009). Triangulation can be used to cross check the insights developed at the Empirical Level and to support the making of decisions as to the most likely explanation of the phenomenon under study.

3.10 The role of the researcher

As a member of the PHE Marketing team the researcher was provided with a unique opportunity to study the use of partnerships using multiple research methods. The researcher was able to observe the use of partnerships in situ, having sight of all documents produced by the PHE Marketing team, attending internal and external meetings (both formal and informal), and having access to the key people involved in the partnerships both at PHE and the organisations they were creating partnerships with. This position of participant observer presented the opportunity to develop a greater understanding of the use of partnerships by PHE in their national social marketing campaigns and provided a valuable approach to answering the research questions.

A potential disadvantage of the role of participant observer is that researcher bias can be introduced to the research. However, Critical Realists accept this bias exists and encourage researchers to be sensitive to it. In a sense, all social research is based on some form of participant observation and Critical Realists use abduction and retrodution to promote reflexivity within a study. The researcher is encouraged to play an active role in the research process and to be reflective about the implications of their decisions regarding the research methods used and the process of data analysis including the values and bias they bring to the research. The researcher is not expected to set aside their own values but to adopt a reflexive approach that acknowledges these may influence the way data are gathered and interpreted.

As a participant observer, the researcher recognised the importance of the historical inheritance of PHE's approach to social marketing and reflected upon the implications of this on the research and themselves. As noted in Section 1.4 above, PHE began operating in April 2013 and the PHE Marketing team were "lifted and shifted" directly from the Department of Health (DH) at that time. The Marketing team brought with them a view of social marketing adopted by the UK Government and implemented by DH in its campaigns. The first of these campaigns, Change4Life, was launched in 2009 and included on its Peer Review Group Professor Jeff French, Professor Gerard Hastings and Dr Susan Jebb (Department of Health, 2009). They provided guidance to DH on social marketing from a theoretical and practical perspective. In addition, the National Social

Marketing Centre (NSMC), formed by the UK Government in 2006, were commissioned to deliver social marketing training to DH employees and regional service providers as part of the pre-launch plan for Change4Life (Department of Health, 2009). The viewpoints of the Peer Review Group and the training supplied by the NSMC provided the context for DH's approach to social marketing and this understanding was brought by the Marketing team into PHE. As an employee of PHE, this approach to social marketing also had influence on the researcher's own conceptual and practical perspective.

At the start of this study there was a point in time where the researcher's identity changed from simply a member of the PHE Marketing team to a participant observer in the research. Following the Critical Realist approach, the researcher adopted the key aspects of reflexivity at all times during the research process, which required an awareness and acceptance of the role of participant observer. This involved constantly acknowledging and questioning the data being collected. For example, one reflexive practice that was adopted involved writing brief notes about the interviews exploring how the researcher felt after each one.

The different methods used to collect data in this study will be explained and justified in the next section of this chapter.

3.11 Data collection

To meet the research objective of generating a greater understanding of the use of partnerships in national social marketing campaigns, it was necessary to use research methods that enabled consideration of the views of the people involved in the partnerships, their perceptions of the partnerships, the decisions made in the creation and maintenance of the partnerships and the consequences of these decisions. This required obtaining the perspectives of people from the PHE Marketing team, and specifically the Partnerships team, the Partnerships Agency that PHE employed and the Partners themselves. The research participants for this study were selected from these three groups.

As noted previously, Critical Realism promotes the use of intensive research methods that focus on the individual in context. Silverman (2014) suggests four intensive research methods that can be used to collect data in an ethnographic approach – observation, textual analysis, interviews, and video/audio recording. These four research methods are discussed in sections 3.11.1 to 3.11.4 below, followed by an explanation of the rationale for the choice of the three methods used in this study in sections 3.11.5 to 3.11.8.

3.11.1 Observation as a method of data collection

Observation is often used in ethnographic research for its ability to focus on the individual in context by looking and listening to what people are doing. Observation provides an opportunity to see and interpret the factors involved in a social phenomenon, such as the creation of partnerships, in the same way as the research participants (Hammersley and Atkinson, 2007). As noted above, a potential disadvantage of observation is that researcher bias can be introduced to the research. However, Critical Realism promotes reflexivity within a study and this study adopted a reflective approach using abduction and retrodution to promote constant internal scrutiny.

3.11.2 Documentary/Textual analysis as a method of data collection

Documents are utilised as a data collection method because of their potential to provide valuable information about an organisation, for example PHE, as a public body, documents play a central role in the activities of PHE. Silverman (2014, p.276) describes documents as “data consisting of words and/or images which have become recorded without the intervention of a researcher”. There are a number of advantages of analysing documents including: their richness, their relevance and effect, their natural occurrence, and their availability (Silverman, 2014). Documents can provide a way of corroborating or challenging information received in interviews or from observation and they can also be a way of stimulating analytic ideas (Hammersley and Atkinson, 2007). Mutch (2014, p.223) promotes the use of documents for Critical Realist research and proposes that “many features of critical realism in practice suggest that we might pay more attention to the historical dimensions of analyses”.

3.11.3 Interviews as a method of data collection

Interviews are a common research method in Critical Realist research for their ability to assist in identifying, describing and analysing the causal mechanisms related to the social phenomenon being studied, e.g. the use of partnerships (Perry et al., 1999). Critical Realists see interviews as a crucial method of research for theorising (Smith and Elgar, 2014). They accept the experiences recounted by interview participants are socially constructed, meaning that interviews are fallible and unlikely to lead to a full understanding of the phenomena under investigation. However, Critical Realists dispute the idea that no knowledge about reality can be obtained from interviewees even though they are an interaction between interviewer and interviewee where both participants create their own versions of the social world.

3.11.4 Video/audio recording as a method of data collection

Research involving video or audio recording aims to capture “naturally occurring talk” rather than “researcher-provoked data” (Silverman, 2014 p.316). This is a distinct research method and has been referred to as “visual ethnography” (Bryman, 2008 p.424). The materials utilised are research driven and can involve recordings made by the researcher or the research participants of a particular social phenomenon over an extended period of time. It does not include the recording of interviews purely for transcription purposes. It is most commonly used as a research method in discourse analysis or conversation analysis. Both of these methods of analysis are linked to the Constructionist philosophy of social research and as such were not seen as being compatible with a Critical Realist approach. With this in mind video/audio recording was not deemed to be an appropriate method for this research.

It was decided that three of the four methods above were compatible with a Critical Realist approach and would support the collection of data that could meet the research objectives. Data were collected both directly and indirectly from the research participants using observation; documentary analysis; and semi-structured interviews. These three methods were utilised and organised within the case study research design and the approach taken for each one is outlined below:

3.11.5 Using observation to collect data in this study

The researcher was employed in the PHE Marketing team from April 2013 until April 2018 and the role required attendance at internal and external meetings as well as involvement in informal discussions. The role necessitated the taking of notes at all meetings attended for use as a reminder of what was said and to record the key actions that had been agreed. Attendees of these meetings were primarily employees of PHE but there were also representatives from various agencies that PHE employed and the partners PHE were working with on their national social marketing campaigns.

The notes taken at meetings were not collected for the specific purposes of this research and some notes were taken prior to the start of the research project. However, the notes provided a unique data source for use in this study. Ethics permission was granted by PHE and The Open University's Human Research Ethics Committee to utilise the notes under the strict condition that no words or phrases were assigned to a particular individual and that no person would be identified, therefore maintaining anonymity. The researcher was also granted ethics approval for not obtaining informed consent from the participants of the meetings and informal discussions. A full explanation of the ethical considerations for this research can be found in Section 3.13 of this chapter.

The researcher's notes of meetings extended to six A4 notebooks of 192 pages each and covered the period of October 2014 to March 2018. All six notebooks were included as data sources for the research. The notes provided a record of what was said at meetings, the tasks that needed to be carried out and by whom. As the research progressed the researcher actively recorded what was being said about partnerships in the meetings.

3.11.6 Using documents as a data source in this study

Desk research was used to identify documents published by Public Health England (and the Department of Health (DH) prior to the formation of PHE) on the subject of social marketing. Separate searches of the Gov.uk website were made to identify documents using the terms “marketing”, “social marketing”, “public health”, “campaign” and “strategy”. The search was filtered by organisation – Department of Health and Public Health England. The initial searches took place in June 2016 and returned a total of seven documents. Further searches were conducted throughout 2017 and two further documents were found to have been published by PHE and these were also included.

All nine documents were used as data sources and are listed in Table 1 below in chronological order.

Table 1: Documents Published by the UK Department of Health and Public Health England

Document Number	Document Title	Source	Publication Date
DOC1	Change4Life Marketing Strategy	HM Government, Department of Health (DH)	April 2009
DOC2	Change4Life One Year On	HM Government, Department of Health (DH)	February 2010
DOC3	Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health	HM Government, Department of Health (DH)	April 2011
DOC4	Change4Life Three Year Social Marketing Strategy	HM Government, Department of Health (DH)	October 2011

DOC5	Marketing Plan 2013-14	Public Health England	April 2013
DOC6	Public Health England Marketing Strategy 2014 to 2017	Public Health England	July 2014
DOC7	Social Marketing Strategy 2014-17: One year on	Public Health England	July 2015
DOC8	PHE Social Marketing Strategy 2017 to 2020	Public Health England	September 2017
DOC9	Stoptober 2016 Campaign evaluation	Public Health England	October 2017

3.11.7 Semi-structured interviews as a data collection method in this study

Interviews were seen as an important data collection method for this research as they provided the opportunity to gain a greater understanding of PHE's use of partnerships in its national social marketing campaigns from the people involved in the creation and maintenance of these partnerships. They also provided an opportunity to clarify and follow-up on data identified from the observation and documents. As such, a great deal of attention was given to the initial interview protocol to ensure it focused on the research questions and used open questions that would provide rich data without leading the participants. The Critical Realist commitment to abduction was followed in the development of the interview questions to ensure they reflected both the existing theory identified in the literature review and the empirical data from this study. To support the abductive approach an initial analysis of the observation notes and the documentary evidence was undertaken prior to the interviews taking place. At the same time, the literature review was also consulted to develop questions that could add to the current understanding of partnerships.

The initial analysis of the notes and documents provided a wealth of topics with the potential to be explored further in the interviews. This required the researcher to make decisions regarding which topics to follow up based on what was deemed to be feasible and achievable given the time and resource constraints of the interviews and the research project as a whole. To support these decisions a rationale was developed to set out the criteria for selecting the topics for the interviews as follows:

- i. How relevant is the topic to the research questions?

- ii. How relevant is the topic to the identified gaps in the research from the literature review?

The research questions focus on the use of partnerships in social marketing, particularly looking to define partnerships and gain an understanding of why partnerships are created and maintained, how partnerships are created and maintained, and the outcomes of these partnerships. To ensure these four areas were covered effectively in the interviews the topics from the initial analysis and the literature review were ranked using the following criteria:

- i. Is the topic relevant to providing a definition of partnerships in social marketing?
- ii. Is the topic relevant to understanding *why* partnerships are created and maintained by PHE?
- iii. Is the topic relevant to understanding *how* partnerships are created and maintained by PHE?
- iv. Is the topic relevant to understanding the *outcomes* of partnerships created and maintained by PHE?

The topics identified through the initial data analysis and the literature review were assessed for their capacity to provide data that could support a greater understanding of one of the three questions above. In this way the following topics were selected for their relevance to the research questions and their potential for increased learning through further exploration in the interviews:

- Definition of partnerships
- Why partnerships are created
- Benefits of partnerships
- Management of partnerships
- Partnership creation process
- Partnership maintenance process
- Long-term partnerships
- Impact of the external environment
- Uncertainty
- Partner needs and motivations
- Coalitions of partners

- Partnerships and approach to social marketing
- Partnership outcomes
- Types of partnership
- Partner selection
- Partnership aims
- Trust, risk and governance and
- Communication.

The selected topics were used to create an initial list of eighteen questions for the semi-structured interviews (see Table 2 below for the rationale for each interview question and how they link to the research questions). The first seven interview questions were derived from the overall research questions, which were developed to address the identified gaps in the literature (see Table 2 below for examples of the literature). These were:

Q1. Why do PHE create partnerships?

Q2. How do PHE create a new partnership? What is the process?

Q3. What are the benefits to PHE of partnerships?

Q4. What are the benefits to the partner?

Q5. How do PHE manage a partnership?

Q6. What are the outcomes of the partnerships?

Q7. In the context of PHE social marketing campaigns how do you define a partnership?

The review of literature identified theory with regards to partnerships and trust, communication, commitment, aims, partner types and partner selection (see Table 2 below for examples of the literature). These were used to develop the following interview questions:

Q8. In the context of PHE social marketing programmes are there different types of partnership? If yes what are they?

Q9. How does PHE select a prospective partner?

Q10. How does PHE agree the aims of a partnership? Are these shared aims with the partner? How are they agreed? Internally? With the partner?

Q11. How does PHE develop and maintain trust with partners?

Q12. What is the governance process around creating the partnerships?

Q13. How does PHE manage communications with partners?

The initial analysis of the observation and documentation data was also used to inform the interview questions, ensuring an abductive approach was taken giving equal value to theory and data. This provided the following questions:

Q14. How does PHE manage risk?

Q15. Where do partnerships fit within the overall social marketing approach at PHE?

Q16. Why does PHE create a coalition of partners?

Q17. How can the environment PHE operate in impact on the creation of partnerships?

Q18. How does PHE manage uncertainty?

Q19. Why does PHE maintain long-term partnerships?

Q20. What do you understand by a partner-led campaign? Can you give an example?

In addition, the need for flexibility was recognised and there was an expectation that the interview questions might need to change to aid discovery during the research (Bryman, 2008). The opportunity was taken within each interview to respond to the direction in which respondents took the interview and to allow the interviewee freedom to talk. The need to be able to probe answers and ask follow-up questions where something of interest arose or there was a need for clarification or explanation of terms was also recognised. To help achieve this permission was obtained from participants for the interviews to be digitally recorded. This enabled the researcher to concentrate on listening to what was said and then prompt and probe where required. Rough notes were taken as an aide memoir and a backup. After each interview was completed the recordings were transcribed to allow the data generated to be examined thoroughly.

A pilot interview was undertaken in February 2017 with a former employee of the PHE Marketing team. The purpose of this interview was to pilot the interview questions to ensure the interviewee understood them and that the responses provided the rich, descriptive data the researcher was looking for. The flow of the interview questions was also tested to ensure they made sense in practice along with the timing of the interview. Bryman (2008, p.443) supports the use of pilot interviews in qualitative research “not just to test how well the interview flows but in order to gain some experience”. Following this pilot interview changes were made to the ordering of the questions and two new questions were identified – one to provide context with an understanding of the social marketing

campaigns the respondent had been involved in and over what length of time; and the other to investigate the future of the partnerships. These questions are as follows:

Q21. Which PHE social marketing campaigns have you been involved in and over what period of time?

Q22. How does PHE/you see the future with regards to partnerships?

The numbering of the questions was amended as it was determined that Q21 above should be used to start each interview and so became Q1. This resulted in all the question numbers above from Q1 to Q20 changing by one. The final list of questions is provided in Table 2 below along with the rationale for their inclusion in the face-to-face interviews, a selection of the literature that support the rationale and the research area from Agostini and Nosella's (2017) framework that they relate to.

Table 2: Rationale for Interview Questions

Interview Question	Rationale for Inclusion
Q1. Which PHE social marketing campaigns have you been involved in and over what period of time?	To provide context with regards to the knowledge and experience of respondent
Q2. Why does PHE create partnerships?	Relevant to research questions – RQ1 and RQ3 – identified gap in literature - Niblett (2005), Lefebvre (2006), Duane (2012), Beall et al. (2012), Duane and Domegan (2019) – an antecedent of partnerships
Q3. How does PHE create a new partnership? What is the process?	Relevant to research questions – RQ1 and RQ4 – identified gap in literature - Duane (2012), Beall et al. (2012), Duane and Domegan (2019) – a partnerships development process
Q4. What are the benefits to PHE of partnerships?	Relevant to research questions – RQ1, RQ3 and RQ5 – identified gap in literature - Duane (2012), Beall et al. (2012), Duane and Domegan (2019) – an antecedent and an outcome of partnerships
Q5. What are the benefits to the partner?	Relevant to the research questions – RQ1, RQ3 and RQ5 – identified gap in literature - Duane (2012), Beall et al. (2012), Duane and Domegan

	(2019) – an antecedent and an outcome of partnerships
Q6. How does PHE manage a partnership?	Relevant to the research questions – RQ1 and RQ4 – identified gap in literature - Duane (2012), Beall et al. (2012), Duane and Domegan (2019) – a partnerships development process
Q7. What are the outcomes of the partnerships?	Relevant to the research questions – RQ1 and RQ5 – identified gap in literature - Duane (2012), Beall et al. (2012), Duane and Domegan (2019) – an outcomes of partnerships
Q8. In the context of PHE social marketing campaigns how do you define a partnership?	Relevant to the research questions – RQ1 and RQ2 – identified gap in literature - Niblett (2005), French et al. (2009), Duane (2012), Duane and Domegan (2019) – an antecedent of partnerships
Q9. In the context of PHE social marketing programmes are there different types of partnership? If yes what are they?	Relevant to the research questions – RQ1 and RQ3 – Literature review identified different partner types. Opportunity to investigate within PHE and add to a typology of partners – Duane (2012) – an antecedent of partnerships
Q10. How does PHE select a prospective partner?	Relevant to the research questions – RQ1 and RQ4 – Literature review identified criteria for selecting prospective partners. Opportunity to investigate within PHE and add to knowledge - Weinreich (1999) – an antecedent of partnerships
Q11. How does PHE agree the aims of a partnership? Are these shared aims with the partner? How are they agreed? Internally? With the partner?	Relevant to the research questions – RQ1 and RQ4 – Literature review identified importance of agreeing aims of a partnership. Opportunity to investigate within PHE and add to knowledge – Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – a partnerships development process

Q12. What is the governance process around creating the partnerships?	Relevant to the research questions – RQ1 and RQ4 – Literature identified governance as important to the success of partnerships. Opportunity to investigate within PHE and add to knowledge – Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – a partnerships development process
Q13. How does PHE develop and maintain trust with partners?	Relevant to the research questions – RQ1 and RQ4 – Literature review identified trust as important to the success of partnerships. Opportunity to investigate within PHE and add to knowledge. – Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – a partnerships development process
Q14. How does PHE manage risk?	Relevant to the research questions – RQ1 and RQ4 – Literature identified risk as important to the success of partnerships. Opportunity to investigate within PHE and add to knowledge – Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – a partnerships development process
Q15. How does PHE manage communications with partners?	Relevant to the research questions – RQ1 and RQ4 – Literature review identified communications as important to the success of partnerships. Opportunity to investigate within PHE and add to knowledge - Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – a partnerships development process
Q16. Where do partnerships fit within the overall social marketing approach at PHE?	Relevant to the research questions – RQ1 and RQ3 – Literature identified the role of partnerships in social marketing theory. Initial analysis of documents and observation notes suggested a different approach at PHE. Opportunity to investigate further - Niblett

	(2005), Abercrombie et al. (2012) – an antecedent of partnerships
Q17. Why does PHE create a coalition of partners?	Relevant to the research questions – RQ1 and RQ3 – Initial analysis of documents and observation notes identified PHE create and maintain coalitions of partners. Opportunity to verify this and investigate further - Lefebvre (2006) – an antecedent of partnerships
Q18. How can the environment PHE operate in impact on the creation of partnerships?	Relevant to the research questions – RQ1 and RQ3 – Initial analysis of documents and observation notes identified the environment PHE operate in as having potential to impact on partnerships. Opportunity to verify this and investigate further - Asbury et al. (2008) – an antecedent of partnerships
Q19. How does PHE manage uncertainty?	Relevant to the research questions – RQ1 and RQ4 – Initial analysis of documents and observation notes identified uncertainty as impacting on the creation and maintenance of partnerships. Opportunity to verify this and investigate further. A partnerships development process.
Q20. Why does PHE maintain long-term partnerships?	Relevant to the research questions – RQ1 and RQ4 – Initial analysis of documents and observation notes identified PHE maintain long-term partnerships. Opportunity to verify this and investigate further. An antecedent of partnerships.
Q21. What do you understand by a partner-led campaign? Can you give an example?	Relevant to the research questions – RQ1 and RQ4 – Initial analysis of documents and observation notes identified PHE create partner-led campaigns. Opportunity to verify this and investigate further. A partnerships development process.

Q22. How do PHE/you see the future with regards to partnerships?	Relevant to the research questions – RQ1 and RQ5 – Literature review identified future commitment as important to the success of partnerships. Opportunity to investigate within PHE and add to knowledge - Duane (2012), Hastings and Domegan (2014), Duane and Domegan (2019) – an outcome of partnerships
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The subsequent interview schedule was then utilised for all the interviews and a copy of this is provided in Appendix D of this dissertation. All 22 questions were put to each research participant, however, the order in which they were asked was adapted to each interview to allow the researcher to respond to what was said and follow the direction of the interviewee. The interviews generally lasted 45-50 minutes with the shortest being 31 minutes and the longest 63 minutes.

The first interview took place in March 2017 and the final interview was completed in March 2018. The settings for each interview were selected based on their convenience for the interviewees. Where possible, interviews took place in a neutral setting such as a coffee shop that was quiet enough for the interview to be effectively recorded. However, where this was not possible, the interview took place in a private office at the interviewees' place of work.

3.11.8 Interview participants

To gain a greater understanding of the use of partnerships at PHE and to collect data that could support the answering of the research questions, it was decided to interview people from the four different stakeholder groups that were involved in the partnerships. As such, the interview participants were selected from the following:

- i. Senior personnel from the PHE Marketing team – these were employees of PHE
- ii. Senior personnel from the Partnerships agency that PHE used to support their work in the creation and maintenance of partnerships – these were employees of the Partnerships agency
- iii. Representatives from the private sector partners PHE worked with – these were employees of the partners
- iv. Representatives from the public sector partners PHE worked with – these were employees of the partners.

Purposive sampling was used to select the interview participants to ensure interviews took place with people who had experience and knowledge of the partnerships created and maintained by PHE in their national social marketing campaigns. Bryman (2008, p.415) explains “the goal of purposive sampling is to sample cases/participants in a strategic way, so that those sampled are relevant to the research questions that are being posed”. A total of 21 people were identified and invited to take part in the interviews and all of them agreed to participate. A more detailed breakdown of these participants is provided in Table 3 below:

Table 3: Participants of the Face-to-Face Interviews

Organisation	Research Participants
PHE – Marketing Team	7 people from the 10 involved in partnerships at PHE
PHE Partnership Agency	4 people from the 6 working on the PHE account
Partner Organisations - Public Sector	5 people representing 5 of the 12 local authorities that PHE worked with closely on the development of their campaigns
Partner Organisations - Private Sector	5 people representing 5 of the 10 strategic partners identified by PHE

3.12 Chapter Summary

This chapter set out the rationale for adopting a Critical Realist philosophical approach to this research. It explained and justified the use of a Case Study methodology to investigate the use of partnerships by Public Health England (PHE) in their national social marketing campaigns. It discussed the utilisation of three intensive research methods – observation, documents and face-to-face interviews – to collect rich, qualitative data. The next chapter will explain and justify how the data collected were analysed using thematic analysis.

Chapter 4

Data analysis

4.1 Introduction

The data collected in this study were analysed using thematic analysis, a method of data analysis used to develop themes from data that support the generation of insight into a research problem. Braun and Clarke's (2006) six-phase approach to conducting thematic analysis was used to provide the framework for the analysis of the data. In line with Critical Realism, the use of Braun and Clarke's (2006) model followed the commitment to an abductive approach whilst thematic analysis encouraged a retroductive approach to the data analysis, with the aim being to identify themes (demi-regularities or frequent reproduced patterns) within the data set.

Braun and Clarke's (2006) model is outlined in Table 4 below along with a description of the six-phase process for Thematic Analysis.

Table 4: Six-phase Process of Thematic Analysis – Source: Braun and Clarke (2006, p.87)

Phase	Description of the process
Phase 1 - Familiarizing yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
Phase 2 - Generating initial codes	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
Phase 3 - Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme.
Phase 4 - Reviewing themes	Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.
Phase 5 - Defining and naming themes	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.

Phase 6 - Producing the report	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back the analysis to the research question and literature, producing a scholarly report of the analysis.
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The six phases of Braun and Clarke's (2006) model for thematic analysis were followed in this research and the approach taken is described and explained in sections 4.1.1 to 4.1.7 below.

4.1.1 Familiarisation with the data

The first phase of thematic analysis involves immersion in the data, which requires repeated, active reading of the data, searching for demi-regularities and patterns. The familiarisation process in this research was started prior to conducting the face-to-face interviews. The rationale for doing this followed Hammersley and Atkinson's (2007) assertion that documents and observation can be used as ways of stimulating analytic ideas. The researcher aimed to identify points of interest from the documents and observation notes that could then be followed up in the interviews.

A preliminary analysis of the initial data set was undertaken to be used in the development of a topic guide for the semi-structured interviews. Initially, the immersion process involved reading and re-reading each of the nine identified documents and the six workbooks of observation notes to obtain familiarity with the data. During this initial immersion process, all data identified by the researcher to be of relevance to the research, specifically the area of partnerships, were highlighted on the records themselves (see example in Figure 8 below). A Word document was created, and all highlighted data was transposed into this document. This became the initial data set and was read again.

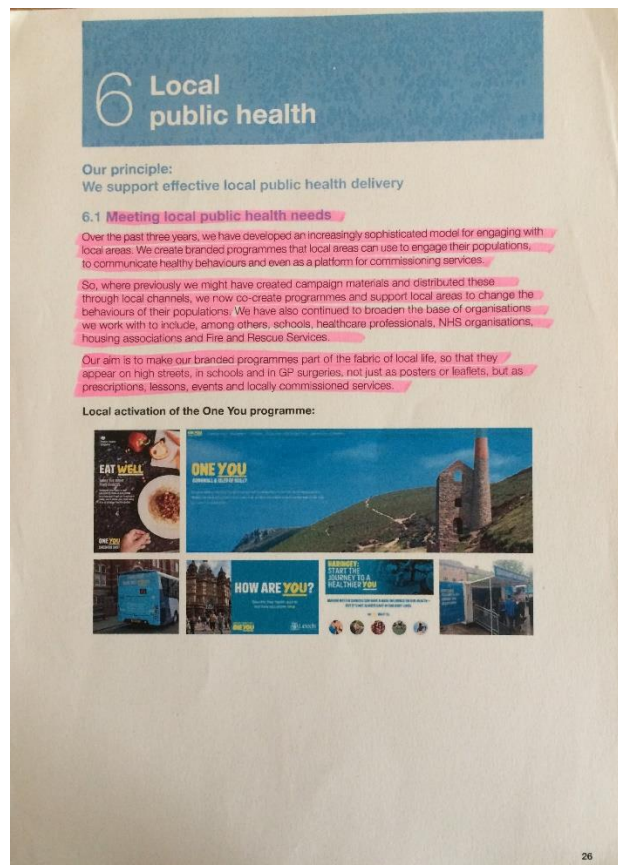


Figure 8: Example Data Collection - Highlighting on Document (DOC8)

4.1.2 Generating initial codes

Saldana (2016, p.165) suggests the use of “exploratory coding methods” to generate initial codes. These are viewed as “tentative labels” to support the initial review of the data and might be replaced by more specific codes during the analysis process. In this study, it was important to follow the Critical Realist commitment to abduction in the generation of initial codes in the thematic analysis. The literature review identified Inter Organisational Relations (IOR) as having relevance to developing a theory of partnerships in social marketing. Agostini and Nosella’s (2017) study identified three areas of research that were integral to IORs - Antecedents; IOR Development Processes; and Outcomes - and these were used to generate the initial codes.

The rationale for using Agostini and Nosella’s (2017) findings as initial codes is as follows. It was anticipated that data coded as Antecedents could advance an understanding of the definition of partnerships (RQ2) and why partnerships are created and maintained in social marketing campaigns (RQ3). Data coded to Partnerships Development Process was expected to advance an understanding of how partnerships are created and maintained in social marketing campaigns (RQ4). Finally, it was determined that data coded to Outcomes could support an understanding of the outcomes of partnerships in social marketing campaigns. In addition, and in line with the Critical Realist research

philosophy, a fourth initial code of “Other” was included to capture any data that did not fit within the Agostini and Nosella (2017) framework.

Saldana (2016, p.168) refers to this method of exploratory coding as “provisional coding” where a pre-set list of codes is determined prior to the commencement of the analysis process. These provisional codes can be developed from preparatory investigation such as literature reviews or the study’s methodological framework. In this study, Agostini and Nosella’s (2017) research was simply used to provide an initial framework to start the coding process.

4.1.3 Initial coding of the documentation and observation data

As noted above, a Word document containing the initial data set was created from the documents and observation notes and the data were read through again and each item of data were coded with one of the initial codes. To aid the coding process, and to support the aim of coder agreement (see section 4.2 entitled Reliability, validity and generalisability below), definitions were created for each initial code from the data collected in this study as described in the sub-sections that follow.

- i. Antecedents - “something that happens or occurs before something else” (Agostini and Nosella, 2017, p.134). When coding the data in this research an antecedent included both macro and micro factors. Macro factors encompassed the definition given to the concept of partnerships along with the environmental conditions that existed prior to partnerships being created such as political, economic, social, technological, legal and environmental factors. The micro factors consisted of organisational requirements and decisions made by PHE or the prospective partner that were in place prior to the partnership being formed. These included PHE’s partnership strategy, the types of partnership that existed, PHE’s partner selection criteria, PHE’s partnership requirements and the benefit PHE could offer partners. In relation to the partner, micro factors included partner reputation, the benefit a partner could offer PHE and the needs of the prospective partner.
- ii. Partnerships Development Process – for the coding of this research the partnership development process included both the decisions taken and the activities carried out in the creation and maintenance of a partnership plus the actions and perceptions of the people involved. These included factors such as the aims and objectives of the partnership, governance mechanisms, trust, risk, leadership and the communications process.
- iii. Outcomes – for coding purposes, everything that happened as a result of the creation and maintenance of a partnership was treated as an outcome. This

included an outcome between the two organisations or activity in support of a PHE social marketing campaign.

- iv. Other - all data relevant to partnerships in this research that did not sit within any of the above 3 headings was given the initial code of Other.

The coding of data was carried out by hand. The researcher did consider using qualitative analysis software to code the data (e.g. Nvivo) but several issues related to this particular study made coding by hand more suitable. The commitment to retrodution required the researcher to engage with the data patiently, continuously going back and forth through the entire data set. This negated one of the benefits of qualitative analysis software, which is increased speed of analysis of large data sets. Also, use of software-assisted analysis is more appropriate when a pre-set, straightforward coding structure is available and coding by hand is more suitable when themes are expected to be developed during the analysis, as was the case in this study (Auld et al., 2002). The data were coded directly onto a print-out of the Word document that contained the initial data set. Once each item of data in the initial data set was coded, four new Word documents were created, one for each of the initial codes, and the coded text was transposed into the document the data had been allocated to, e.g. Antecedents, Partnerships Development Process, Outcomes and Other.

Having coded the initial data set using the provisional coding method the next step was to recode the data allocated to each initial code. Critical Realists follow the idea of retrodution in data analysis and Saldana (2016, p.68) suggests a cyclical approach to coding that fits with a retroductive approach. He proposes a “reverberative” approach to coding by “comparing data to data, data to code, code to code, code to category, category back to data”. Saldana (2016, p.68) proposes the need for two coding cycles – first cycle and second cycle - and suggests the use of different coding methods during first cycle coding and second cycle coding. Saldana (2016, p.68) describes first cycle methods as “those processes that happen after the initial coding of data” and states “most first cycle methods are fairly direct”. By comparison second cycle methods are more challenging and require analytical skills to enable “classifying, prioritising, integrating, synthesizing, abstracting and theory building” (Saldana, 2016 p.69).

First and second cycle coding methods were used to support the thematic analysis of data in this study. “Descriptive” coding was the method selected for the first cycle coding of this initial data set and the overall data set. Saldana (2016) proposes descriptive coding as a useful way of coding data produced from documents and field notes. In “descriptive” coding a word or short phrase is used to summarise the topic of a section of qualitative data. Descriptive codes identify the topic that is being talked or written about rather than the content. To enable the process of descriptive coding, each of the four Word

documents created using the initial codes was read through again to identify descriptive codes relevant to the research area within each broad heading. The data in each document were recoded using a word or phrase that described the topic being discussed or written about. Some items of data were allocated to more than one code. At this point the 4 initial codes were supplemented by 62 descriptive first cycle codes. These codes are listed in Table 5 below.

Table 5: Descriptive First Cycle Codes Developed From The Initial Data Set

Initial Codes	Descriptive First Cycle Codes
Antecedents	Political environment Political change Partners with scale Partners provide a solution Change the social norm Partner types Why partnerships? Partner selection Partnership strategy Change in why Brand Economic environment Economic change Definition of partnerships Benefits to PHE Evolution of partnerships Learnings Consistent message Strategic partners Partner environment Partners with profile

	Partner role Partners with reach Totemic partners Partners with visibility Shared objectives Localisation Uncertainty Risk Budget/Financial Expectation Reputation Campaign type Resistance
Partnership Development Process	Change in process Co-branding Creation process Evolution of approach Learnings Consultation Governance Creation of partnerships Maintenance of partnerships Partnership model Partnership aims Partnership scope Trust Commitment Communication

	Leadership Co-creation
Outcomes	Partnership activity Relationship Change in outcomes Learnings Exchange Change in behaviour of target audience Financial
Other	Timings Social movement Coalition of partners Partner needs Benefit to partner

At this stage of the thematic analysis it was important to list out all the first cycle codes to support the identification and labelling of all potentially interesting aspects in the data. Following the Critical Realist requirement for retrodution, it was understood that these first cycle codes would be reviewed, redefined and recoded during the first cycle coding process to support the transition from first to second cycle codes. Saldana (2016, p.212) states “the goal is not to “take you to the next level”, but to cycle back to your first coding efforts so you can strategically cycle forward to additional coding and qualitative data analysis methods”.

Examples of the data associated with selected first cycle codes are provided in Tables 6, 7 and 8 below to illustrate how diverse data were grouped under a given code. Table 6 shows illustrative examples of data coded with the label Political Environment. This code was used to identify data that related to the political environment PHE operated in that could have had implications for the creation and maintenance of partnerships.

Table 6: Examples of First Cycle Codes - Political Environment

Political Environment code – Illustrative data
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*The Coalition Government has a clear intent to devolve responsibility to **partners**, both civic and commercial (Change4Life 3 year marketing strategy, 2011)*

*The Coalition Government has a clear intent to have fewer, more effective communications and a greater devolution of responsibility to **partners**, both civic and commercial (A new social marketing strategy for public health, 2013)*

***Government** periods of sensitivity leading up to and following the 2015 General Election and the 2016 EU Referendum took PHE campaigns off-air (Observation fieldnotes)*

Table 7 provides examples of data coded with the label Partner Selection. This label was used to identify data related to the selection of prospective partners by the PHE Marketing team.

Table 7: Examples of First Cycle Codes - Partner Selection

Partner Selection code – Illustrative data
<p><i>If we are to have the health outcomes we want as a society, we need everyone, be they individuals, families, communities, schools, businesses, civic institutions or voluntary organisations, to help us make this happen. We will refine and refocus our approach to partnerships, for example by brokering national partnerships with large companies, national media owners and other key influencers of health to deliver depth, scale and momentum to our programmes (PHE Social Marketing Plan 2013-14)</i></p> <p><i>Too often public health hasn't engaged effectively with the organisations who have the opportunity to be the biggest influence on our health...the marketing team will work with them to increase the depth, quality and impact of our work (PHE Marketing Strategy 2014-2017)</i></p> <p><i>To launch One You with a number of high profile commercial partners who resonate with the target audience including retailers, pharmacy, leisure and healthcare brands, in addition to extensive engagement with public sector partners including all 152</i></p>

<i>upper tier local authorities in England and the NHS (Observation fieldnotes)</i>

Table 8 gives illustrative examples of data coded with the label Coalition of Partners. This label was used to identify data related to the creation of coalitions of partners by the PHE Marketing team.

Table 8: Examples of First Cycle Codes - Coalition of Partners

Coalition of Partners code – Illustrative data
<p><i>Bringing together a coalition of local, non-governmental and commercial sector organisations that will use their influence to change behaviour (Change4Life Marketing Strategy, 2009)</i></p> <p><i>Coalition of grassroots supporters, NHS and local government staff, commercial sector partnerships and non-government organisations joining forces with the Government to bring Change4Life to life (Change4Life One Year On Strategy, 2010)</i></p> <p><i>Create coalitions of public, private and third sector organisations to drive change and engage the public wherever they are (PHE Marketing strategy 2014-2017)</i></p>

4.1.4 Initial coding of the interview data

As noted in section 4.1.1 above, the rationale for coding an initial data set from the documentation and observation data was to identify areas of interest relevant to the research questions that could be followed up in the face-to-face interviews. Once data collection from the interviews was completed the recordings from these were transcribed and the transcript of each interview was printed off and coded in the same way as described above for the documentation and observation data. The transcript of each interview was read through and all relevant data coded using the four initial data codes. The coded data were then allocated to one of the four Word documents - Antecedents, Partnerships Development Process, Outcomes and Other. The combined data from the interviews, documentation and observation in each document were read through again and recoded using one or more of the 63 first cycle codes or with new labels created during this coding process. An additional 19 first cycle codes were created through this process, making a total of 82 first cycle codes, and the additional codes are presented in Table 9 below.

Table 9: Additional First Cycle Codes From The Interview Data Set

Initial Codes	First Cycle Codes
Antecedents	Always-on campaigns Value exchange Customer journey Being present at point of sale Cuts to local services Face-to-face intervention Mutual benefit Signposting partners
Partnership Development Process	Partnerships strategy Partner approach Change in partnerships team structure Change in partnerships team importance Learning and understanding of partnerships Activate campaign through partners Commercial partner model Public sector partner model
Outcomes	ROI Future commitment Partner investment

When the task of creating first cycle codes was completed, the researcher followed Gioia et al.'s (2012) suggested approach for reducing down the number of first cycle codes to support the creation of second cycle codes. The full list of first cycle codes was reviewed to identify similarities and differences in each of the four initial codes of Antecedents,

Partnerships Development Process, Outcomes and Other. During this review, codes on a similar topic were put together and a list of 11 categories were created to provide some structure to the data. The 11 topic categories were developed from the data and represented a description of an issue that specific first cycle codes could be grouped together under. Saldana (2016) recommends the creation of categories to assist in the review and recoding process. Saldana (2016, p.12) notes that during this process some “first cycle codes may be later subsumed by other codes, relabelled, or dropped altogether”. The 82 first cycle codes in this study were reviewed and structured into 11 topic categories. This process enabled the 82 codes to be refined down to a more manageable 42 first cycle codes, which covered the whole data set, and these are listed in Table 10 below:

Table 10: List of First Cycle Codes Developed From The Whole Data Set

Initial Codes	Topic Categories	Initial First Cycle Codes	Final First Cycle Codes
Antecedents	Reasons why PHE create partnerships	Always-on campaigns Value exchange Customer journey Being present at point of sale Face-to-face intervention Partners with scale Partners provide a solution Change the social norm Partners with profile Partners with reach Totemic partners Partners with visibility Localisation	Change in rationale for partnerships Change in social marketing approach Coalitions of partners Partner relationship with target audience Always-on campaigns Co-creation of value

		Why partnerships? Change in why Brand Consistent message Social movement Coalition of partners Activate campaign through partners	
Antecedents	Impact of Macro-environment on partnerships	Political environment Political change Cuts to local services Resistance Economic environment Economic change Uncertainty Risk Budget/Financial Partner environment Timings	Uncertainty Political change Economic climate Budget cuts Technological developments Social change Resistance to partners Risk
	Rationale for choice of partners	Partner selection Partnership strategy Partner role Mutual benefit Signposting partners Definition of partnerships Benefits to PHE	Signposting partners Strategic partners Partner selection Categories of partner Change in definition of partnerships

		<p>Evolution of partnerships</p> <p>Learnings</p> <p>Strategic partners</p> <p>Expectation</p> <p>Reputation</p> <p>Campaign type</p> <p>Partner types</p> <p>Shared objectives</p>	
Partnership Development Process	PHE's approach to partnerships	<p>Change in process</p> <p>Evolution of approach</p> <p>Learnings</p> <p>Partnerships strategy</p> <p>Partnership model</p> <p>Learning and understanding of partnerships</p>	<p>Approach to partnerships</p> <p>Partnerships model</p> <p>Long-term partnerships</p> <p>Partnerships learnings</p>
Partnership Development Process	Partnership creation process	<p>Creation of partnerships</p> <p>Partner approach</p> <p>Creation process</p> <p>Governance</p> <p>Partnership aims</p> <p>Partnership scope</p> <p>Commercial partner model</p> <p>Public sector partner model</p>	<p>Creation of partnerships</p> <p>Approach to prospective partners</p>

Partnership Development Process	Partnership maintenance process	Maintenance of partnerships Co-branding Consultation Trust Commitment Communication Leadership Co-creation	Maintenance of partnerships Trust Future commitment
Partnership Development Process	PHE's Partnerships team	Change in partnerships team structure Change in partnerships team importance	Change in importance of partnerships team Change in structure of partnerships team
Outcomes	Outcomes measures	Change in outcomes Tangible outcomes Intangible outcomes	Measurement of outcomes Intangibility of partnerships Outcomes model
Outcomes	Campaign outcomes	Change in behaviour of target audience Exchange ROI Financial	Change of behaviour in target audience Financial measures Brand-building Building coalitions
Outcomes	Partnership outcomes	Partnership activity Relationship Learnings Future commitment Partner investment	Value of relationship Learnings Partner investment Outcomes for partner

Other	Other	Timings	Partner needs
		Social movement	
		Coalition of partners	
		Partner needs	
		Benefit to partner	

The next phase of the thematic analysis process required recoding the 42 first cycle codes to create second cycle codes that could support the generation of themes related to the research questions. Saldana (2016, p.12) suggests that by coding and recoding researchers should “expect – or rather strive for – your codes and categories to become more refined and, depending on your methodological approach, more conceptual and abstract”. The goal of second cycle coding is to “develop a sense of categorical, thematic, conceptual, and/or theoretical organisation” (Saldana, 2016 p.234) from the first cycle codes.

The method of second cycle coding selected in this study is “Pattern Coding”. The aim of pattern coding is to develop a “meta code” that can be applied as a category label to identify similarly coded data (Saldana, 2016). Saldana (2016, p.236) describes pattern codes as “explanatory or inferential codes” that “identify an emergent theme”. Carrying out pattern coding required a further review of the first cycle codes and the data ascribed to them in an attempt to see patterns among the codes, which could then be used in the search for potential themes. At the same time, the literature review was also read through again. All first cycle codes were considered important in this process but the more dominant codes, those most commonly applied, were used as the starting point to identify patterns that could generate second cycle codes. Once a potential second cycle code was identified within the data a new Word document was created for that code. Then all data deemed relevant to that second cycle code were transferred into the new document and read through again to ensure the data fitted within the code. At this stage data could be allocated to more than one second cycle code.

To aid the search for patterns within the data that could generate second cycle codes, a visual representation in the form of an initial data structure was created for each of the four areas of Antecedents, Partnerships Development Process, Outcomes and Other and these are shown in Figures 9, 10, 11, and 12 below.

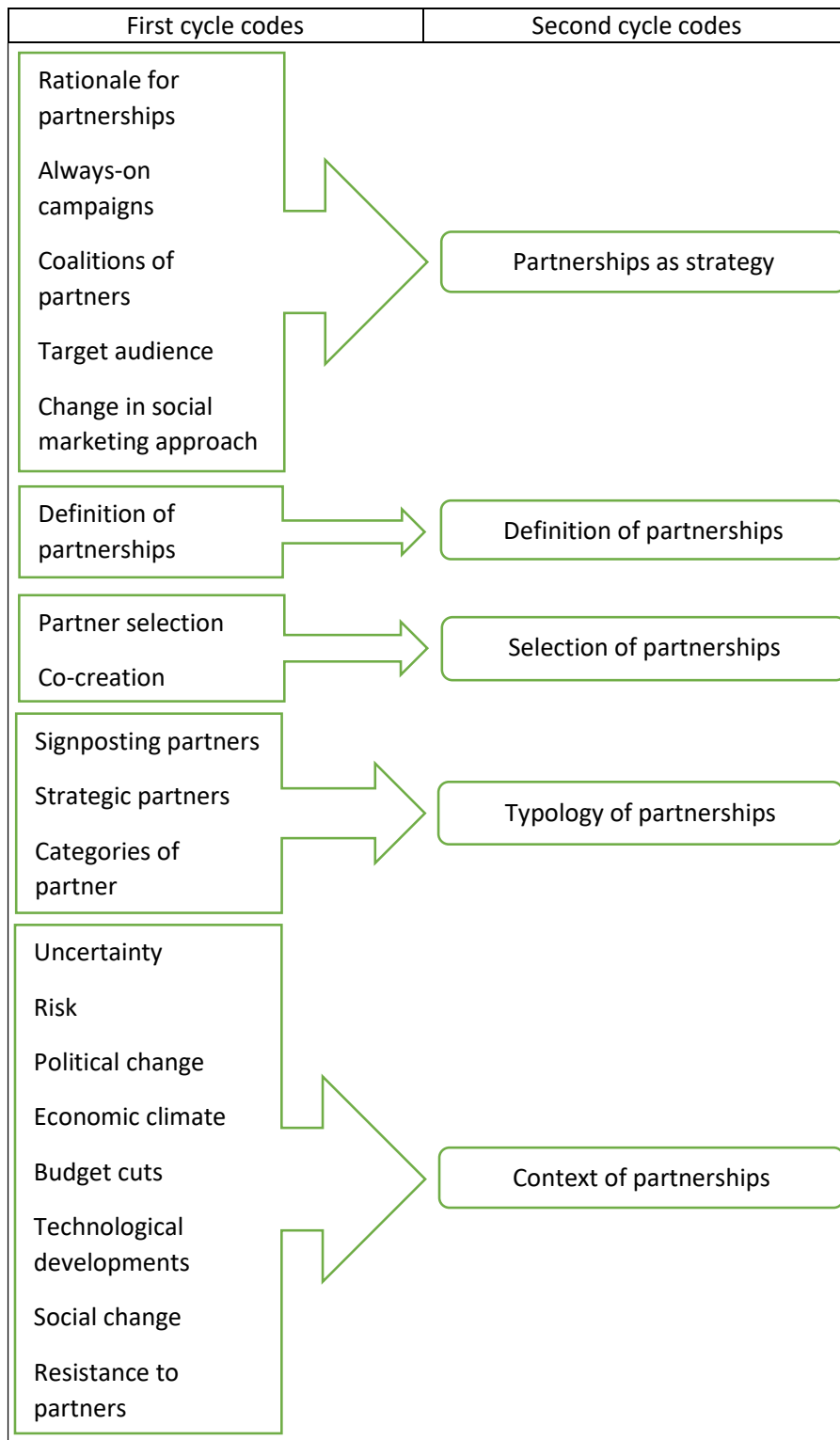


Figure 9: Data Structure Developed from Data Attributed to the Initial Code of Antecedents

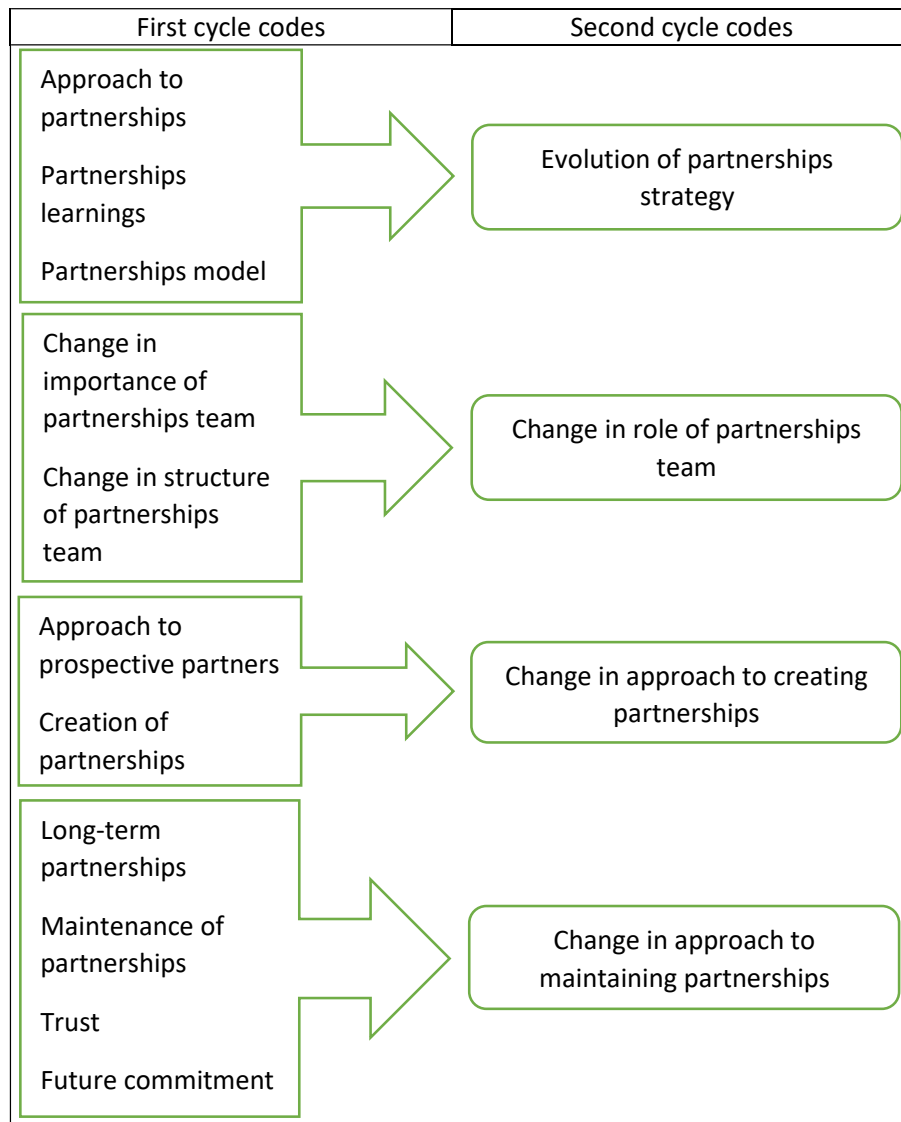


Figure 10: Data Structure Developed from Data Attributed to the Initial Code of Partnerships Development Process

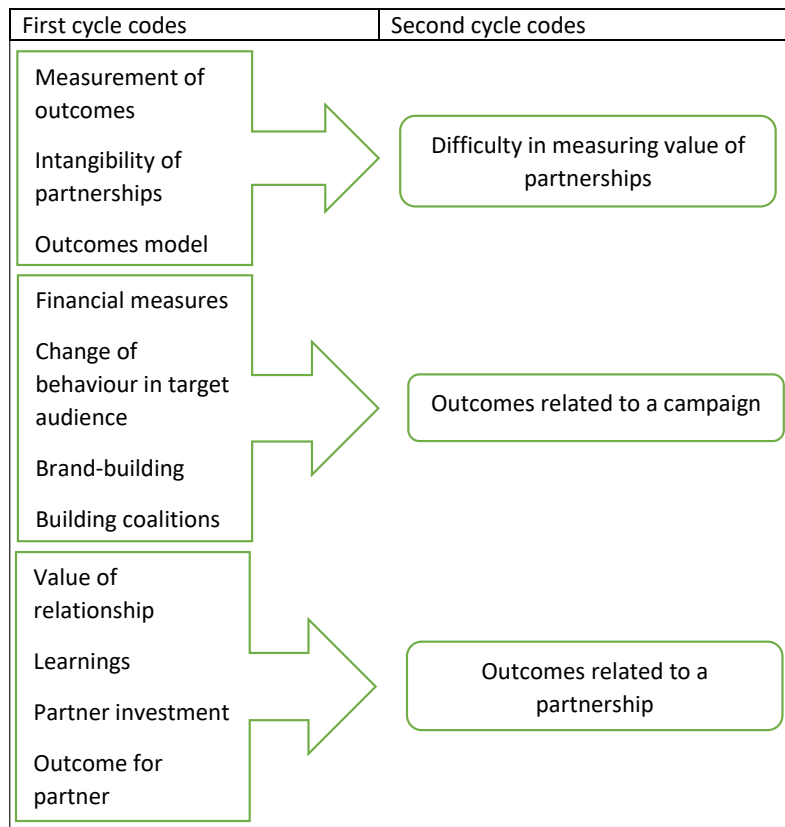


Figure 11: Data Structure Developed from Data Attributed to the Initial Code of Outcomes

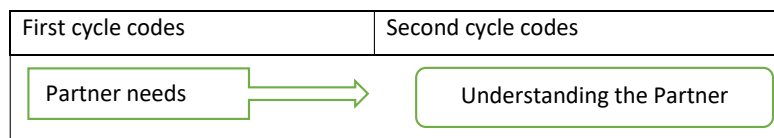


Figure 12: Data Structure Developed from Data Attributed to the Initial Code of Other

Following the thematic analysis approach, the second cycle codes are used to develop themes that can support the advancement of understanding of the five research questions in this study. The second cycle codes from the data attributed to Antecedents are specifically utilised in the search for themes in relation to RQ2 and RQ3. The second cycle codes from the data assigned to Partnerships Development Process are used to search for themes relevant to RQ4. The second cycle codes from the data ascribed to Outcomes are employed to search for themes appropriate to RQ5 and the second cycle code attributed to the code of Other are used to search for themes in relation to all the research questions. By searching for themes across these four research questions it is anticipated that this will advance an understanding of the overarching research question, RQ1. The themes are presented in the next section of this chapter and the full results of the data

collection and development of the first and second cycle codes are presented in the Findings chapters of this thesis.

4.1.5 Searching for themes

Saldana (2016, p.199) describes a theme as “an *extended phrase* or *sentence* that identifies what a unit of data is *about* and/or what it *means*” (italics as per the original text) and he sees a theme as “an outcome of coding, categorization, or analytic reflection, but it is not something that is, in itself, coded” (Saldana, 2016 p.15). DeSantis and Ugarriza (2000, p.362) propose that a theme “brings meaning and identity to a recurrent [patterned] experience and its variant manifestations”. In thematic analysis, themes are statements of ideas that summarise what is going on or suggest why something is happening (Rubin and Rubin, 2012).

Data in this study were coded by using descriptive coding to develop first cycle codes and then utilising pattern coding to produce second cycle codes. The next step was to develop themes that would bring meaning to the patterns in the data. Saldana (2016, p.231) suggests an approach to developing themes is to “add the verb “is” and “means” after the phenomenon under investigation”. This approach was taken with the second cycle codes and 13 themes emerged. These are presented in Figures 13, 14, 15, and 16 below.

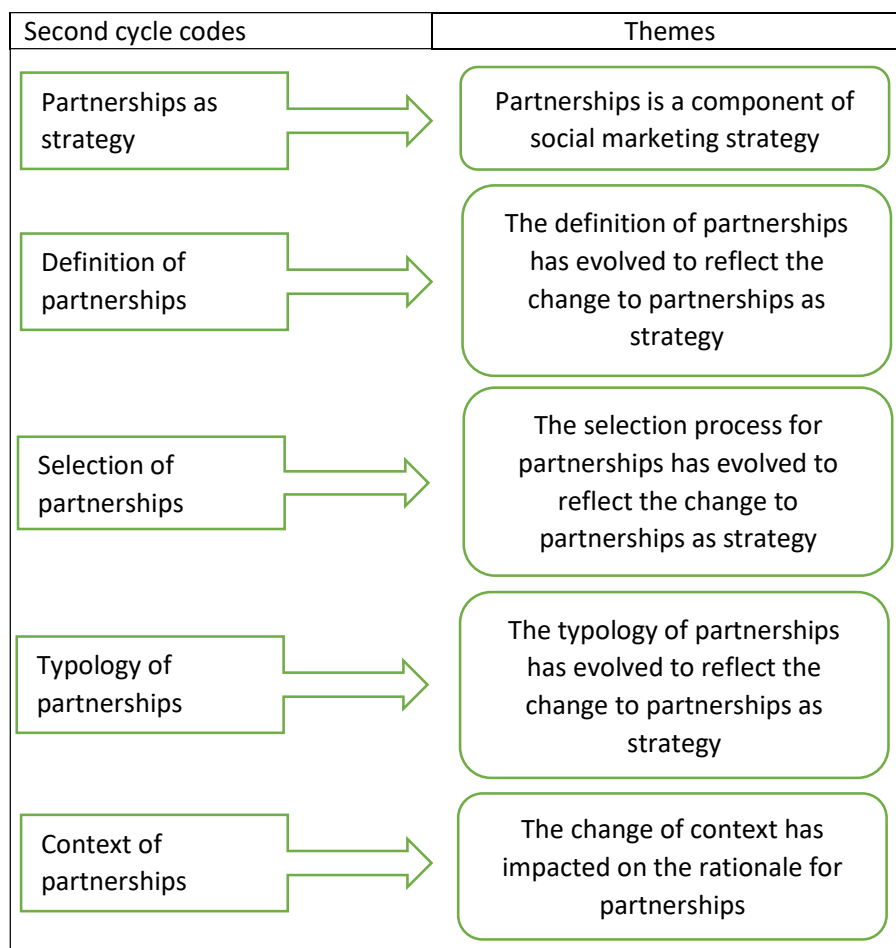


Figure 13: Themes relating to why PHE create and maintain partnerships as part of their national social marketing campaigns

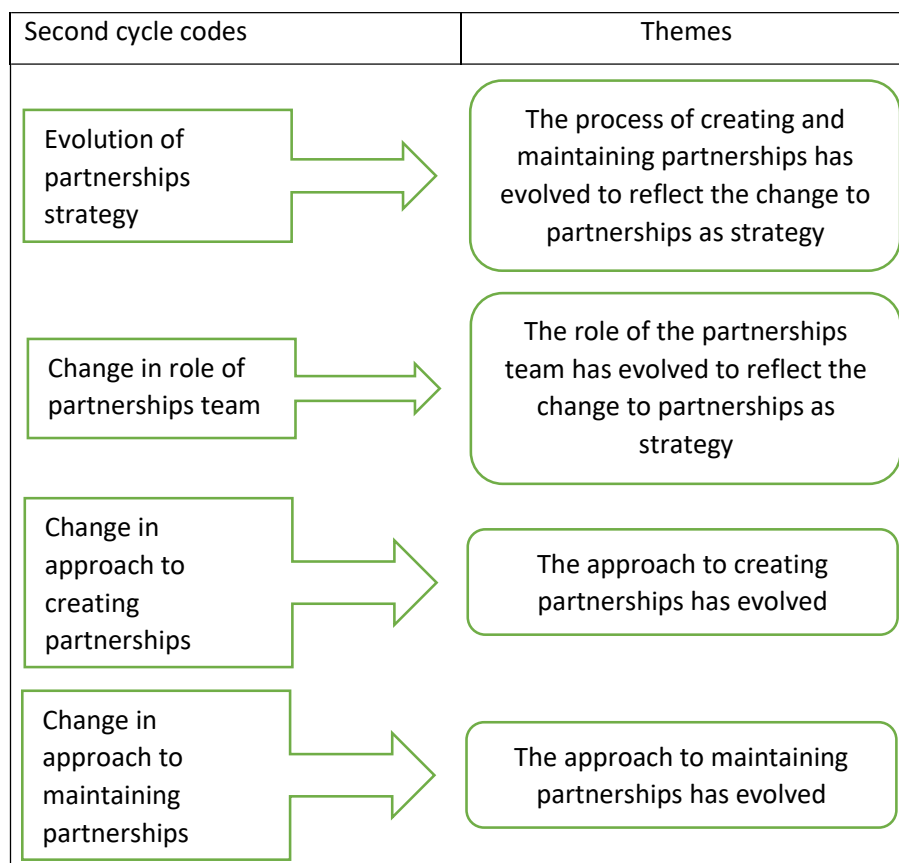


Figure 14: Themes relating to how PHE create and maintain partnerships as part of their national social marketing campaigns

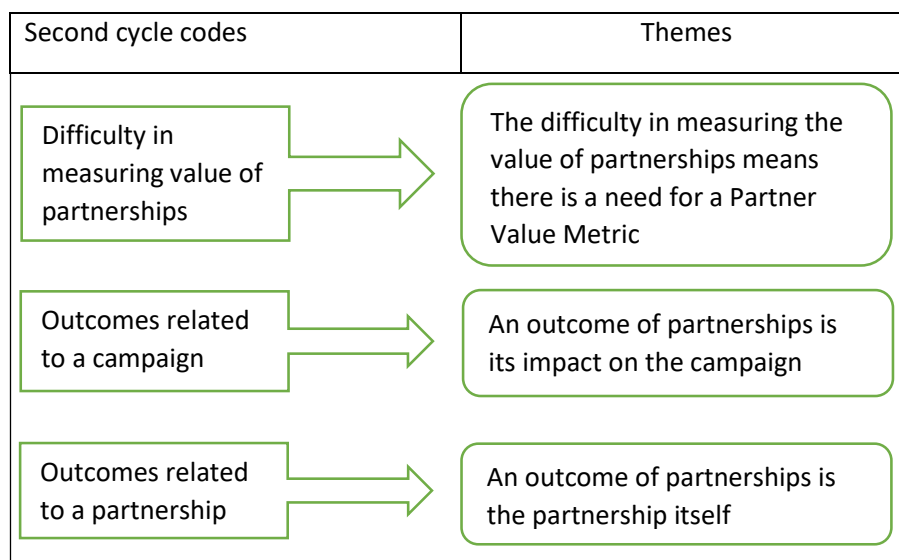


Figure 15: Themes relating to the outcomes of partnerships created and maintained by PHE as part of their national social marketing campaigns

Second cycle code	Theme
Understanding partners	Understanding partners is essential to building long term relationships

Figure 16: Theme relating to data attributed to the initial code of Other

4.1.6 Reviewing themes

A total of 13 themes were developed from the second cycle codes and each of these themes was then reviewed to ensure it works in relation to the data coded to it and also in relation to the entire data set. Once all the themes were reviewed and their legitimacy determined by the data, a visual representation of the themes was created in the form of thematic maps. Dey (1993, p.192) notes that “diagrams can help us disentangle the threads of our analysis and present results in a coherent and intelligible form”. Diagrams can help identify relationships between themes and these can be seen in the thematic map shown in Figures 17, 18, and 19 below:



Figure 17: Thematic Map of Themes 1-5 relating to Why PHE Create and Maintain Partnerships

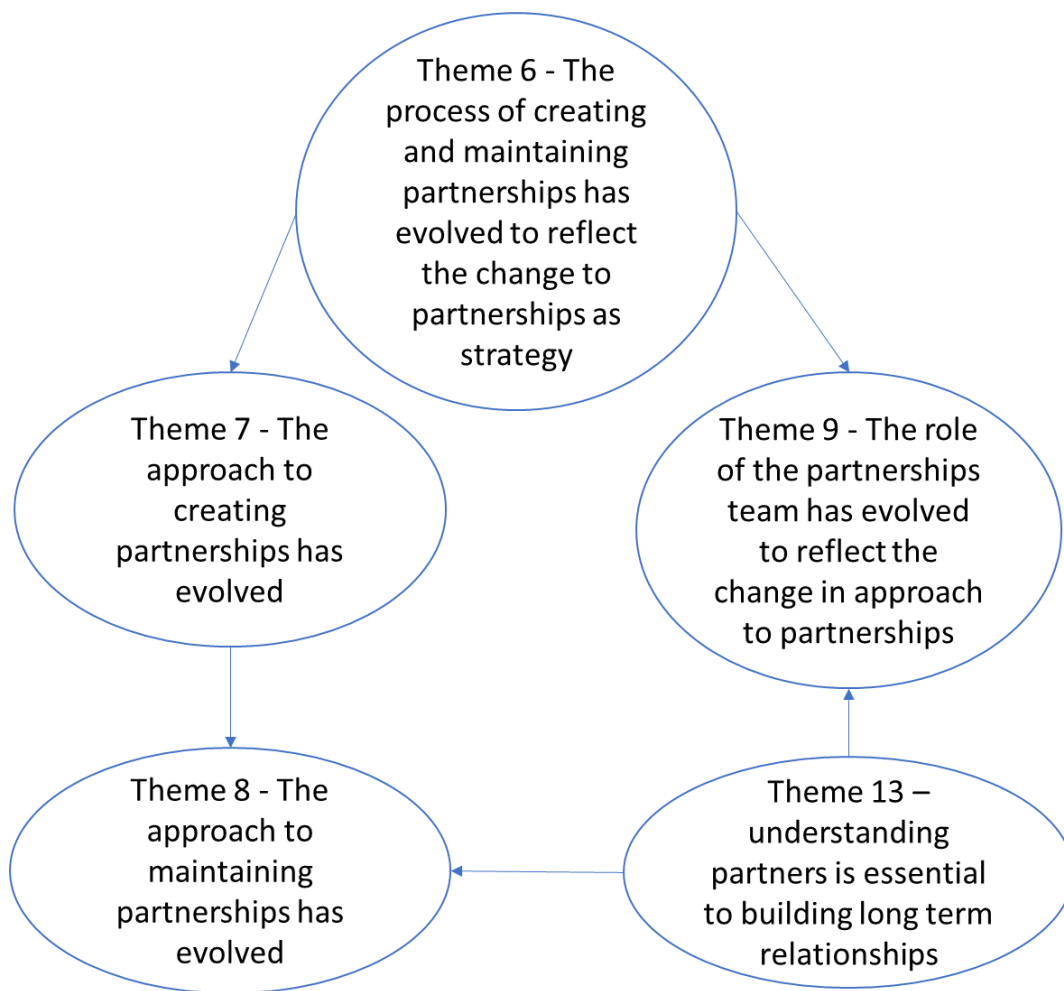


Figure 18: Thematic Map of Themes 6-9 and 13 relating to How PHE Create and Maintain Partnerships

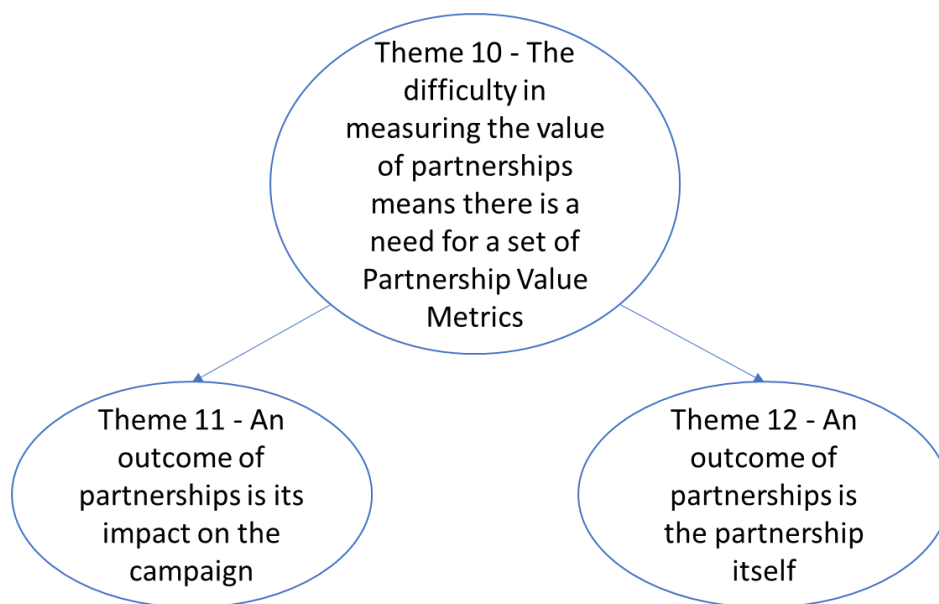


Figure 19: Thematic Map of Themes 10-12 relating to the Outcomes of Partnerships PHE Create and Maintain

4.2 Reliability, validity and generalisability

Healy and Perry (2000, p.122) propose six criteria for judging the quality of realist research as follows:

- Ontological appropriateness – research problem deals with complex social science phenomena involving reflective people - research problem is a how and why problem.
- Contingent validity – open “fuzzy boundary” systems involving generative mechanisms rather than direct cause-and-effect - theoretical and literal replication, in-depth questions, emphasis on “why issues”, description of the context of the case.
- Multiple perceptions of participants and of peer researchers – multiple interviews, supporting evidence, broad questions before probes, triangulation. Self-description and awareness of own values. Published reports for peer review.
- Methodological trustworthiness - trustworthy - the research can be audited
- Analytic generalisation – analytic generalisation (that is, knowledge and theory building) rather than statistical generalisation (that is, theory-testing)
- Construct validity – use of prior theory – triangulation.

Although Healy and Perry (2000) state realist research as opposed to critical realist research, their criteria were deemed to be useful in providing a framework for ensuring reliability in this research. The steps taken in this study to meet the Healy and Perry (2000) criteria are outlined below:

- The research problem dealt with the use of partnerships in social marketing. The nature of partnerships is such that they are complex social science phenomena and the research uses an instrumental case study to investigate the use of partnerships by PHE. The research questions focus on a why and how problem. This meets the criteria of ontological appropriateness.
- Partnerships are open systems with causal powers and causal liabilities that make them contingent. This meets the criteria of contingent validity.
- The research used multiple data collection methods that focus on understanding the perceptions of the participants. Triangulation was used to cross check insights developed at the Empirical Level and to support the making of decisions as to the most likely explanation of the particular

phenomenon under study. In addition, the research was presented to peers at The Open University and the University of Hertfordshire at various points during the study to obtain feedback on the methodological approach and the findings. This meets the criteria of multiple perceptions of participants and peer researchers.

- The research aimed to provide a clear description of the methodological approach that can be audited. For example, to provide greater transparency to the data coding process the concept of inter-coder agreement was followed. A written procedure for coding the data was produced and given to a member of the supervisory team, who then used it to code a sample of the data set. Once this was completed a meeting took place between the researcher and the person who coded the data to compare and discuss their coded data. Discrepancies in the codes allocated to data were identified and a discussion took place to determine why different codes were allocated to the same data. The definition for each code was reviewed to give further clarity and support greater inter-coder agreement. This meets the criteria of methodological trustworthiness.
- The research objective was knowledge building rather than knowledge/theory testing (statistical generalisation). This meets the criteria for analytic generalisation.
- The research provided information about the constructs of the theory being built to support their measurement. A data structure was produced to highlight the rigour of the data analysis in moving from the raw data to the development of themes to help the generation of understanding and the development of knowledge. The concept of parsimony, the idea that the most important factors relating to the specific case are considered rather than attempting to capture everything in the data, was followed to support the development of impactful knowledge. This meets the criteria of construct validity.

4.3 Ethical considerations

“Research ethics refers to the moral principles and actions guiding and shaping research from inception through to completion, the dissemination of findings and the archiving, future use, sharing and linking of data” (The Open University, 2019 p.1). Most social research requires some element of intervention into aspects of social life. There is always a risk that, even when asking someone seemingly innocent questions, the research could prove disturbing to that participant. Therefore, it is good practice for the ethical

implications of a social research project to be made transparent, together with the procedures used to deal with them.

This research followed The Open University Code of Practice for Research (OU, 2017), which is based on the principles of high standards, honesty, openness, accountability, integrity, inclusion and safety. The researcher also considered the ESRC research ethics framework (ESRC, 2015). The ethical implications of this research were discussed in depth with the research supervision team. In addition, the Risk Checklist Human Research Ethics Committee (HREC) of The Open University and the PHE Research Ethics and Governance Group (PHE REGG) checklist were used to assess the research design. Ethics approval for this research was sought and obtained from both The Open University Human Research Ethics Committee and the PHE Research Ethics and Governance Group.

Overall, the research was deemed to be low risk. However, the use of the notes taken by the researcher as part of their work did have ethical implications because informed consent was not obtained from the participants at the time. Therefore, using the researcher's notes was seen as a form of covert research. The ESRC research ethics framework does support covert research "when it may provide unique forms of evidence that are crucial to the research objectives and methodology or where overt observation might alter the phenomenon being studied" (ESRC, 2015 p.31) as was the case in this research. The Open University Human Research Ethics Committee and the PHE Research Ethics and Governance Group were consulted with regards to the use of the researcher's notes and approved their use in this study.

The potential issues of covert research were addressed including considering the rights of the research subjects, privacy and the avoidance of harm. As the researcher was employed by PHE, and a civil servant, they were governed by an ethical code that included respecting the general rights of the people they work with and this was applied to the research. As a government organisation PHE has to be transparent in the work that it does and even though the meetings the researcher attended were often in closed rooms they were intrinsically public.

The purpose for incorporating a form of covert research was not to deceive people. There is a clear distinction between covert research and deception. According to Spicker (2011) deception occurs where the nature of a researcher's action is misrepresented to the research subject. This was not the case in this research. The Director of Marketing and the Head of Research Governance at PHE were advised of the research and gave authorisation for the notes to be used as part of the research.

The rationale for not obtaining informed consent was threefold. Firstly, it was felt disclosing the research was likely to affect the behaviour of the people attending the meetings and, as an employee of PHE, it was important for the researcher that the meetings ran as normal and the attendees behaved in their usual way. Secondly, from a practical perspective it would have been very difficult to ensure informed consent from every participant of the meetings. There were a large number of regular planned meetings involving both internal colleagues and representatives from external agencies. It was impossible to know who would be attending the meetings until they happened and asking each person to complete a consent form would have disrupted the meetings and potentially become the issue rather than focusing on the social marketing campaigns. In addition, there was a large number of ad-hoc meetings, informal get-togethers and discussions both internally and externally, and the researcher would not have had the capacity to ensure that all the participants were fully informed. As Punch (1986, p.36) notes “in a large organisation engaged in constant interaction with a considerable number of clients it is physically impossible to obtain consent from everyone and seeking it will kill many a research project stone dead”. Thirdly, there could have been an issue for PHE if people had been asked to complete a consent form and one or more of them declined. As these people were required to attend the meetings this could have made the research highly disruptive for the PHE Marketing team.

Informed consent was obtained for all of the face-to-face interviews and participants were provided with a research information sheet (see Appendix A) and signed a consent form (see Appendix C) beforehand to explain the aims of the research and how the interviews would be carried out. Permission was also obtained for the interviews to be digitally recorded. Participants were provided with the opportunity to withdraw from the research project and have any data they had provided destroyed prior to it being transcribed. Participants were offered the opportunity to see the transcript of their interview to ensure they were happy it was an accurate record of the interview. No participants took up this offer.

The researcher considered the protection of the anonymity of the participants as essential for this research with the aim of guarding the participants from any undesirable consequences. As such, safeguards were put in place to ensure no personal information was passed on to anyone outside the research team, including staff at PHE. All identifying material, such as names and addresses, was removed and anything said in the meetings and interviews was anonymized and not attributed to a participant when the research was written up as part of this doctoral thesis. All personal data recorded such as contact details will be destroyed once the study is completed.

4.4 Chapter summary

This chapter describes and justifies the approach taken to the analysis of data in this study utilising the method of thematic analysis. The next five chapters of this thesis will present the findings from the data analysis and explain how they relate to the research questions. Chapter 5 explains the framework created to provide a helicopter view of the findings in this study. Chapter 6 proposes a definition of partnerships developed from the data (in response to the second research question -RQ2) and presents an understanding of why PHE create and maintain partnerships in their national social marketing campaigns (in recognition of the third research question - RQ3). Chapter 7 explores how PHE create and maintain partnerships (in acknowledgment of the fourth research question - RQ4) and Chapter 8 looks at the outcomes of the partnerships PHE create and maintain (in line with the fifth research question - RQ5). Then Chapter 9 draws all the findings in this study together to generate a greater understanding of the contribution of partnerships in national social marketing campaigns (in response to the first research question - RQ1).

Chapter 5

Framework of findings in this study

5.1 Introduction

The overarching objective of this study is to generate a greater understanding of the use of partnerships in national social marketing campaigns and this provides the focus for the first research question (RQ1). As explained in Chapter 4 above, thematic analysis was applied to the analysis of all data collected in this study (documents, observation, and interviews) applying both the Critical Realist practices of abduction and retroduction. The aim of this approach was to search for themes within the data that could provide “data-to-theory connections” (Gioia et al., 2012 p.23).

A visual representation of all the findings in this study was developed in the form of a framework to support their presentation and also show the scope of the research. This is presented in Figure 20 below and it highlights three distinct areas of findings – (i) Partnerships as strategy; (ii) Partnerships development process; and (iii) Outcomes of partnerships. These three areas of findings support the generation of understanding into the four research sub-questions in this study (RQ2, RQ3, RQ4 and RQ5) and, when brought together, provide an insight into the overarching research question (RQ1). An overview of each area of the framework is provided in sections 5.2 to 5.4 below with the full findings presented in Chapters 6-8 of this thesis along with supporting evidence from the data.

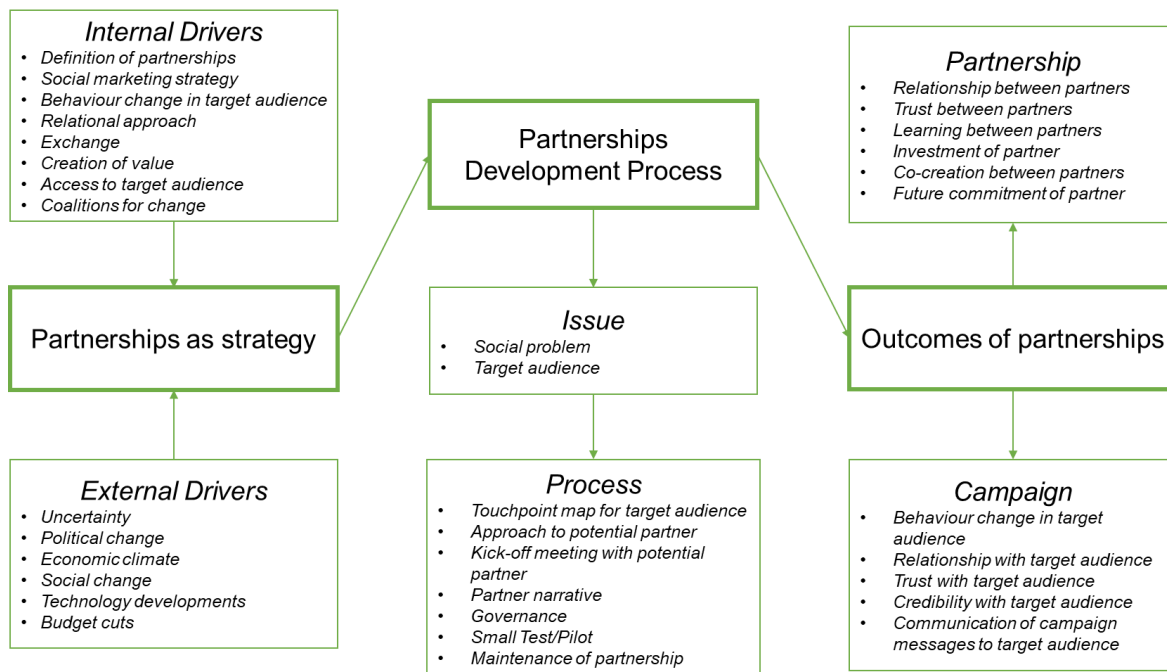


Figure 20: Framework of findings in relation to partnerships in national social marketing campaigns

5.2 Partnerships as strategy

The key finding in this study highlights that the PHE Marketing team see the concept of partnerships as a core component of their macro-level social marketing strategy for tackling complex social problems through the development of national campaigns. PHE's thinking has evolved over time to reach this perspective and the research identified internal and external drivers that impacted on this view of "partnerships as strategy". These drivers are explained below and the findings related to them are presented in Chapter 6 of this thesis.

The key internal driver for this view is that the PHE Marketing team now see partnerships as a concept that is integral to their approach to social marketing strategy. This way of seeing partnerships defines why they are created and how they are created and maintained. The PHE Marketing team is split into three core divisions – planning, campaign development and partnerships – all of equal strategic importance in their approach to social marketing.

A further internal driver is that PHE aim to change the behaviour of the target audiences for their national social marketing campaigns and believe that partnerships, as a concept, can provide an opportunity to effect a change in behaviour. In addition, PHE have adopted a relational approach to their social marketing campaigns but understand that they do not have existing relationships with their target audiences. Instead, partnerships are key to this approach and PHE identify prospective partners who have a relationship, trust, and credibility with the target audience.

Another internal driver is the importance of exchange in PHE's national social marketing campaigns. PHE see partnerships as providing the opportunity to create a compelling exchange with the target audience as partners have knowledge and experience of developing products, services and brands that support the creation value for their customers and themselves. Added to this partnerships offer PHE with an opportunity to gain access to their target audience, either physical or virtual, as partners have existing customers/clients who make up the target audience for PHE's campaigns. This access can be at a critical point for behaviour change, for example, at point of influence, decision making or purchase.

A further driver for this approach to partnerships is linked to the way PHE develop their social marketing campaigns. PHE aim to build "coalitions for change" to support the target audience in trying to change their behaviour. Partnerships are integral to the creation of these coalitions. To achieve this approach to "partnerships as strategy" PHE select prospective partners they feel can have the greatest impact on behaviour change in their target audiences. These are organisations, brands or people who have a relationship with

the target audience, are trusted by them and have the credibility to effect a change in their behaviour. PHE look for partners with reach, relevance, trust, and impact. At the same time, PHE consider the risk of partnerships, particularly, any reputational risk of working with partners. It is important for PHE to have the trust of government and the public health community as well as their target audience. As such, the assessment of risk is a key internal driver in relation to partnerships.

PHE also have a number of external drivers that have had an impact on the context of their approach to social marketing and their idea of “partnerships as strategy”. The key external driver has been the effect of political change. PHE are an executive government agency and were created in 2013 by the Coalition government of the time. Although PHE are an independent body they are impacted by the policies of the UK government and the PHE Marketing team have to get their budget and spending approved by the Cabinet Office.

Recent changes in government have created an uncertain operating environment for PHE, particularly during the period of austerity where they saw their budgets reduced year on year. In addition, the downturn in the economic climate added to this uncertainty. This impacted on PHE’s thinking with regards to their national social marketing campaigns and the idea of partnerships, with long-term strategic partnerships being seen as a way to reduce uncertainty and extend the budget.

Social change, such as decreased levels of trust in government and increased use of social media, has also been a key external driver of PHE’s approach to partnerships as this has had an impact on the target audiences for PHE’s campaigns. Linked to social media was the rapid development in technology particularly digital, which had an impact on behaviour change strategies. Finally, a change in the resistance to partnerships, and working with commercial partners in particular, from the government, the public health community, and the target audience was identified as an external driver for PHE in their use of partnerships. There appears to be a greater understanding and acceptance of the use of partnerships and this has enabled PHE to incorporate partnerships as strategy in their national social marketing campaigns.

5.3 Partnerships development process

The findings of this study highlight that PHE have evolved their development process for their respective partnerships to reflect the idea of partnerships as strategy. There are two key elements that inform how PHE create and maintain partnerships - (i) the Issue; and (ii) the Process. These elements are explained below and the findings that evidence them are presented in Chapter 7 of this thesis.

The first element in PHE's Partnerships development process is a consideration of the issue that PHE are looking to address in their national social marketing campaigns. This involves defining the social problem to be tackled and identifying the target audience whose behaviour PHE are looking to effect a change in. By getting a clear understanding of the big picture of the issue PHE can then set about the second element in the Partnerships development process and this is the actual process of creating and maintaining the individual partnerships required to provide an opportunity to effect a change in behaviour of the target audience.

This creation and maintenance process begins by utilising the information on the social problem and the target audience to develop a touchpoint map to identify prospective strategic partners who could provide an opportunity to effect a change of behaviour in the target audience. Having identified all the potential partners PHE then create a short-list of prospective partners who have an existing relationship with the target audience, are trusted by them and have credibility with them.

Using this short-list PHE make an initial approach to the prospective partner with the aim of having a face-to-face introductory meeting to develop an understanding of the partner and explore where there may be mutual benefit. Following this meeting, if the prospective partner is from the commercial sector PHE look to create a joint partner narrative, which sets out objectives for the partnership, and agree the governance arrangements. These two stages are not seen as required for strategic partnerships with organisations from the public sector as they are viewed by PHE as offering less risk.

Once an agreement to take the partnership forward has been agreed the next step for PHE is to test the relationship on something small, e.g. a pilot project, that is co-created with the partner. PHE's Marketing team includes a stand-alone Partnerships team who manage this whole process and the ongoing maintenance of the partnership.

5.4 Outcomes of partnerships

The third area of findings visualised in the framework is "Outcomes of partnerships". The research highlights two areas of outcomes of partnerships in national social marketing campaigns and these are related to – (i) the Partnership; and (ii) the Campaign. These two areas are explained below and the findings relating to them are presented in Chapter 8 of this thesis.

With respect to the partnership outcomes these consist of a number of tangible and intangible factors. Most important is the quality of the relationship between PHE and the partner and the level of trust developed between the two parties. In addition, a further outcome are the learnings developed over time by both PHE and the partner with regards

to partnerships and social marketing. This incremental learning has informed the corporate knowledge of PHE, DH and the partners involved in the campaigns. These outcomes have an impact on the perceived value of the partnership and the likelihood of future commitment. Further partnership outcomes include the amount of investment a partner puts into the relationship and the level of co-creation between the two parties.

With regards to the campaign outcomes the key factor is the ability of the partnership to change the behaviour of the target audience. This is related to the quality of the relationship, the level of trust and the amount of credibility developed through the partnership with the target audience. Finally, a further outcome is the capability of the partner to effectively communicate with the target audience.

5.5 Chapter summary

This chapter highlights the scope of this research and presents a visual representation of all the findings in the form of a framework to support their presentation. Three distinct areas of findings are identified - (i) Partnerships as strategy; (ii) Partnerships development process; and (iii) Outcomes of partnerships. The themes that emerged within each of these areas will be presented and justified in the next three chapters of this thesis starting with Partnerships as strategy in Chapter 6.

Chapter 6

Partnerships as strategy – why PHE create and maintain partnerships as part of their national social marketing campaigns

6.1 Introduction

This research adopted a Critical Realist philosophy and followed an abductive approach to the analysis of data by using the research of Agostini and Nosella (2017) to provide a framework to guide the generation of four initial codes. The first of these codes is “antecedents”, the definition of which is “something that happens or occurs before something else” (Agostini and Nosella, 2017 p.134). Gaining knowledge of the antecedents of partnerships supports a greater understanding of why PHE create and maintain partnerships as part of their national social marketing campaigns.

As explained in Chapter 5 above, a framework was developed in this study to provide a visual representation of the findings from the research and this is presented in Figure 21 below. The findings from the data allocated to the initial code of “antecedents” were brought together under the heading of “Partnerships as strategy” in this framework, as highlighted in green on the left of Figure 21. This concept of “Partnerships as strategy” is of key importance in understanding why PHE create and maintain partnerships as part of their national social marketing campaigns (RQ3) and in developing an appreciation of how PHE define partnerships in relation to their national social marketing campaigns (RQ2).

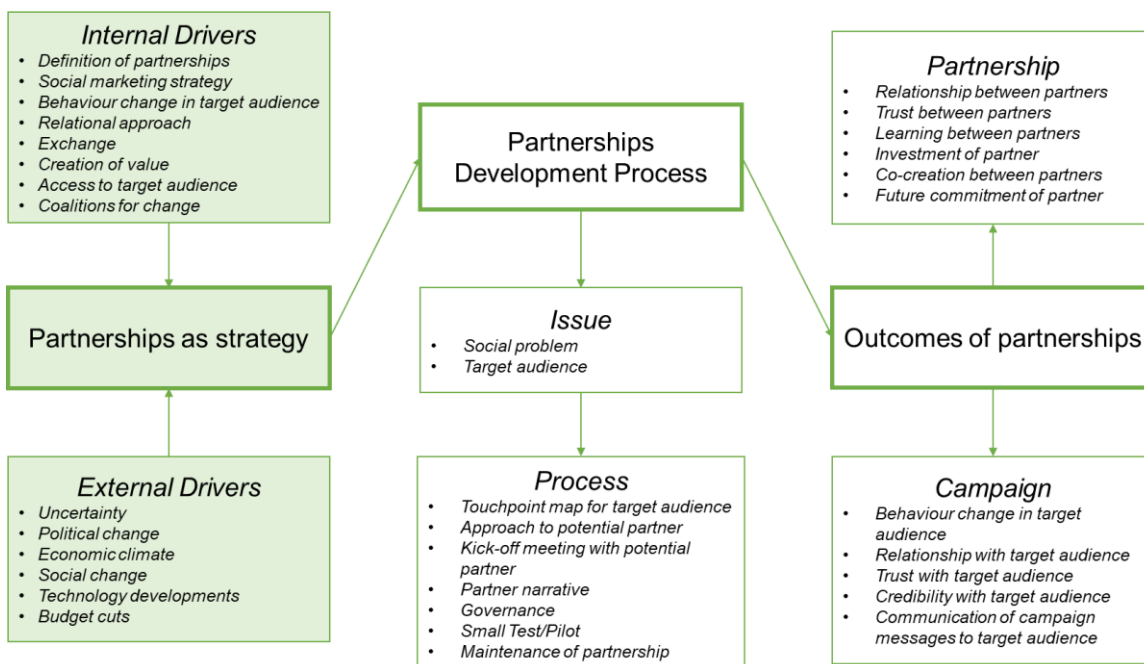


Figure 21: Framework highlighting the findings relating to “partnerships as strategy” in national social marketing campaigns

The analysis of all data attributed to the initial code of “antecedents” produced 19 first cycle codes and the data related to these were further analysed and reviewed to develop 5 second cycle codes, from which 5 initial themes were developed with regards to the antecedents of partnerships in social marketing. A thematic map is used to visualise the relationships between each initial theme using arrows to highlight the direction of impact, and this is shown in Figure 22 below.

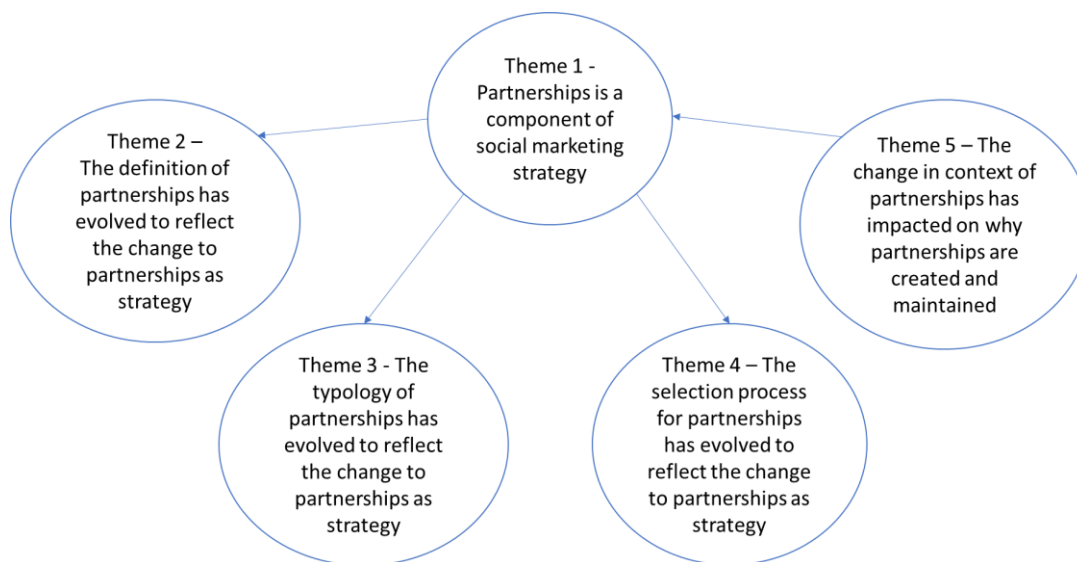


Figure 22: Thematic Map Generated from the Data Attributed to the Initial Code of Antecedents

The findings relating to Themes 1 to 5 will be presented and explained in sections 6.2 to 6.6 of this chapter and the links between these findings and the extant theory identified in the literature review is explored. Within these sections the evidence from the data that supported the development of the first and second cycle codes will also be provided and the complete data tables for all themes are included in Appendix E.

6.2 Theme 1 – Partnerships is a component of social marketing strategy

The first theme generated from the antecedents data is that partnerships is a component of PHE’s social marketing strategy. This is a significant finding as the review of social marketing literature found no reference to the concept of partnerships being considered strategic and instead it is presented as an element of the tactical social marketing mix.

The theme – Partnerships is a component of social marketing strategy – is related to the internal drivers of partnerships at PHE, as highlighted in Figure 21 above. These internal drivers are explained in sections 6.2.1 to 6.2.5 below and the evidence from the data that support Theme 1 is presented in sections 6.2.6 to 6.2.11.

6.2.1 Partnerships are integral to social marketing strategy

The key internal driver related to Theme 1 is that the PHE Marketing team now see partnerships as a concept that is integral to their approach to social marketing strategy. This approach to partnerships differs to that presented in the social marketing literature, which advocates their use as a tactical tool in the social marketing mix.

The literature promotes the use of strategic planning in social marketing through the development of a social marketing plan that includes the '4Ps' as a way of formulating the offer to the target audience (Lee and Kotler, 2020). The offer is developed once a situational analysis has been completed, the target audience selected, and the objectives set. As such, the '4Ps' are social marketing tactics and partnerships are included within these tactics. Weinreich (1991, 2011), also saw Partnerships as a social marketing tactic, but elevated it to the 5th 'P' in her "8Ps" alongside Product, Price, Place, Promotion, Publics, Policy and Purse-strings. Donovan and Henley (2010) also included Partnerships as a stand-alone tactic in their social marketing mix of '7Ps', along with Product, Price, Place, Promotion, Policy and People. Hastings and Domegan (2018) augmented the traditional "4Ps" with the addition of Participation, Partnerships and Positioning. They observed that "Partnerships are widely accepted as the 5th 'P' in the social marketing intervention mix" (Hastings and Domegan, 2018 p.112). Lefebvre (2006, p.41) discusses "the strategy of developing partnerships" in respect to social marketing but relates this to the strategy of using partnerships as a tactical element of a campaign and not as a core component of social marketing strategy.

This treatment of partnerships as a marketing tactic is exemplified in the Social Marketing Framework developed by the UK's National Social Marketing Centre (NSMC) in Figure 1 above (page 26). Here partnerships would be included in the Intervention and Methods Mix, which is a tactical aspect of the strategy for "exchange".

As the field of social marketing has evolved, so new concepts have been proposed, such as macro-social marketing (Kennedy, 2015) and systems social marketing (Domegan et al., 2016), that adopt a more holistic approach to tackling social problems than that presented in the NSMC Customer Triangle in Figure 1 above. However, within these new approaches to social marketing, partnerships are still presented as an additional "P" in the social marketing toolkit (Kennedy, 2016; Hastings and Domegan, 2018). Hastings and Domegan (2018) augmented the traditional "4Ps" with the addition of Participation, Partnerships and Positioning. They observed that "Partnerships are widely accepted as the 5th 'P' in the social marketing intervention mix" (Hastings and Domegan, 2018 p.112).

PHE is an executive government agency and, as such, develop and implement social marketing campaigns at a national level. PHE adopt a macro-level social marketing

strategy to effect behaviour change in their target audiences that has partnerships at its very heart. Their approach to partnerships has been influenced by this macro-level strategy and is different to that presented in the social marketing literature. Rather than partnerships being a tactical element of their social marketing campaigns it is a strategic component of PHE's overall social marketing approach. PHE see partnerships and partners as having the opportunity to effect behaviour change in the target audience (as explained in section 6.2.2 below).

When assessing the social problem to be tackled, PHE take a national, macro-level view assessing the big picture and include partnerships in their initial situational analysis. They look to understand the target audience for a particular problem/behaviour, the competition, the potential partners, what they as PHE can do as an organisation, and the wider environment/context that the problem sits within (section 6.2.10 of this chapter provides the evidence to support this focus on the target audience).

PHE's macro-level strategy has similarities with the systems social marketing concept identified in the review of literature in section 2.2.4 above (for example - Biroscak et al., 2014; Domegan et al., 2016; Kennedy, 2017; Truong, 2017). Systems social marketing views the social problem as part of a multi-layered, interconnected system where the individual is enveloped and influenced by their micro, meso, exo and macro environments. This suggests that to effect a change in behaviour of the target audience social marketers need to simultaneously bring about change at all levels in the system. This systems view is shown in Figure 23 below:

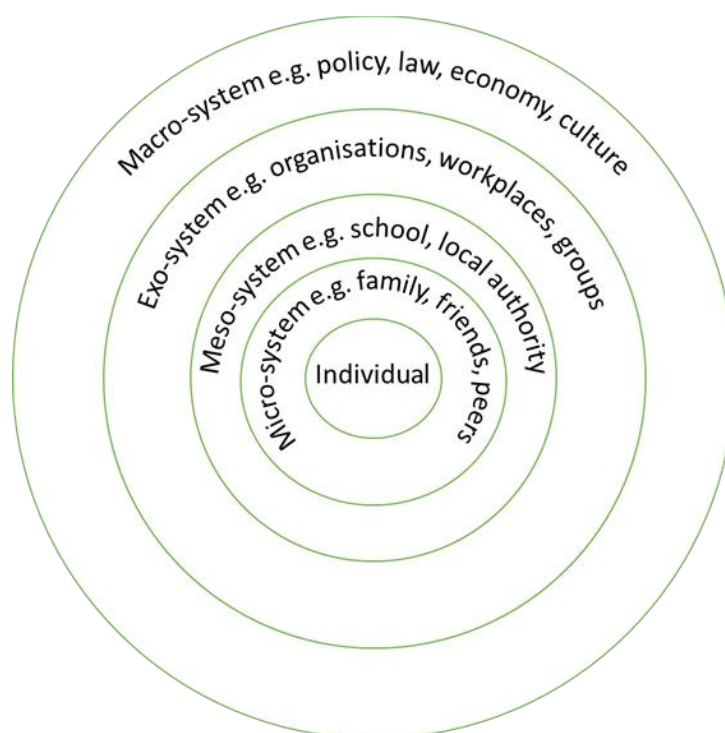


Figure 23: Visualisation of a marketing system – adapted from Gordon et al. (2017, p.106)

The data suggest PHE's view of social marketing is similar to the view of systems social marketing visualised by Gordon et al. (2017) in Figure 23 above. PHE appear to take a macro-level approach to developing an understanding of social problems by considering and analysing the impact of the wider environment and the actors within the different levels and their influence on the behaviour of individuals in the target audience. At the centre of PHE's approach is the Individual that represents the target audience whose behaviour the strategy aims to change. PHE then analyse the context of the social problem at a national (macro), organisational (exo), community (meso) and individual (micro) level to identify actors within each level that have potential to influence the behaviour of the target audience. By looking at the context of the social problem PHE aim to create partnerships that can affect behaviour change at all levels (section 6.6 of this chapter presents the evidence that supports this idea of Context under Theme 5). PHE's approach to tackling complex social problems like obesity appears to be in-line with the Marketing Systems view identified in the literature review for this study (French and Gordon, 2015; Hastings and Domegan, 2014; 2018). PHE's approach to partnerships as a component of their social marketing strategy as identified in this research has been visualised and is presented in Figure 24 below.

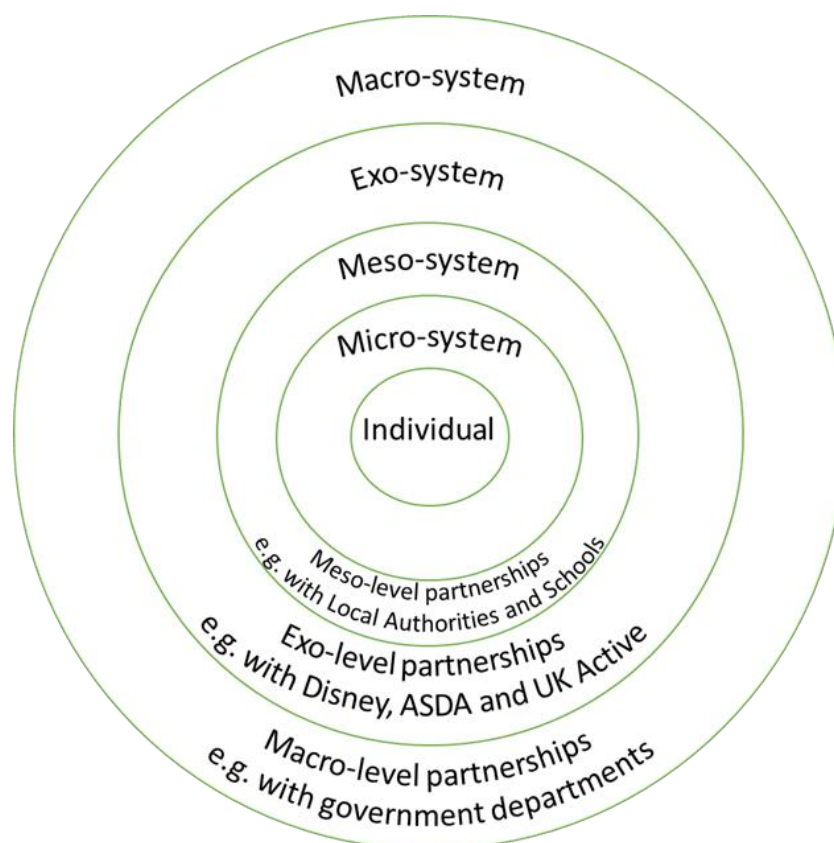


Figure 24: PHE's approach to social marketing strategy

As noted above, PHE analyse the context of the social problem they are looking to tackle and identify prospective partners who have the potential to change behaviour in the target

audience. At a national (macro) level PHE engage with national government departments, e.g. Department of Health, Department for Education, Department for Transport, to gain cross-government support for their social marketing campaigns. At an organisational (exo) level PHE create partnerships with national organisations, e.g. Disney, ASDA and Lloyds Pharmacy. At a community (meso) level PHE create partnerships with local organisations, e.g. Local Authorities, NHS Trusts, and schools. They also utilise the resources of national partners who have a community presence, e.g. local ASDA and Lloyds Pharmacy stores.

6.2.2 Partnerships provide an opportunity to effect a change in behaviour in the target audience

At the launch of the Change4Life campaign in 2009 partnerships were created to gain access to the partners' channels. This was to enable Change4Life messages to be communicated to the target audience via these channels. However, PHE now see partnerships as providing the opportunity to effect change within and across different levels of complex social problems. Part of their rationale for this is a belief that partners have an existing relationship with the target audience, are trusted by the target audience, and are present in the everyday lives of the target audience. PHE do not have this type of relationship with their target audience and may not have the same level of trust with them as the partners do. This represents a different approach to social marketing strategy with regards to partnerships from that identified in the academic literature. As noted in Section 6.2.1 above, the literature review for this study identified that partnerships were seen as a part of the tactical social marketing mix, which traditionally consists of the "4Ps" - Product, Price, Place and Promotion. These are the tactics social marketers use in the interventions they develop as part of their social marketing campaigns/programmes. PHE take a different approach and see partnerships as a core component of their social marketing strategy.

The relational approach to social marketing with regards to partnerships as referred to in the above description will be explained in the next section of this chapter.

6.2.3 Partnerships support a relational approach in social marketing and the creation of value through the exchange

An internal driver for PHE viewing partnerships as a component of social marketing strategy is their implementation of a relational approach to their campaigns. Partnerships can support this relational approach because the partners have a relationship with the target audience that PHE "piggy-back" onto in order to effect behaviour change. Partners can provide motivation to change behaviour, can provide solutions into the hands of the target audience in the form of products and services, and can support the target audience

through the journey of behaviour change. Trust has been identified as a key factor in Relationship Marketing (Morgan and Hunt, 1994) and is also required in social marketing to gain permission to broach difficult subjects with the target audience and gain the commitment required from them to change behaviour (Duane, 2012). This is linked to the relational approach to social marketing identified in the literature (Hastings, 2003).

This type of relational approach to social marketing has an impact on the exchange. Instead of a dyadic exchange between PHE and the target audience there is now a complex exchange between PHE, the partner and the target audience. This can be seen as $A \leftrightarrow B \leftrightarrow C \leftrightarrow A$ where PHE is A, the Partner is B and the Target Audience is C. This relational approach to social marketing featuring a complex exchange is presented in Figure 25 below.

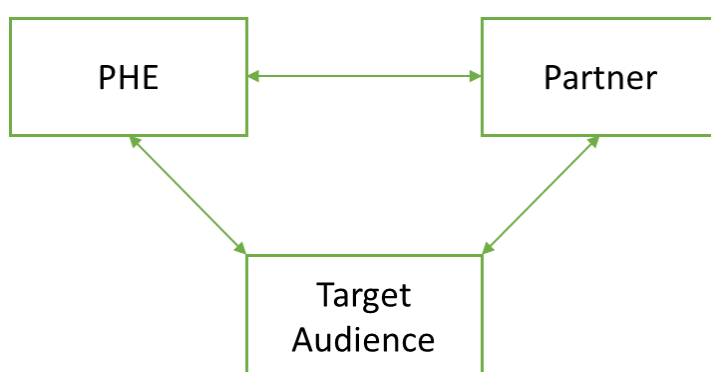


Figure 25: The relational approach to social marketing used by PHE

In complex exchange value needs to be created and delivered to all parties. PHE appear to adopt this type of complex exchange as part of their social marketing strategy. PHE aim to create value for their partners, for example association with a positive health campaign, who in turn create and deliver value to the target audience, for example products or services that support making a positive behaviour change. In return PHE receive value from their partners, for example providing the direct relationship to the target audience. PHE also create value for and receive value from their target audience, for example PHE create an environment that is conducive to behaviour change and the target audience attempt to change their behaviour. This is visualised in Figure 26 below.

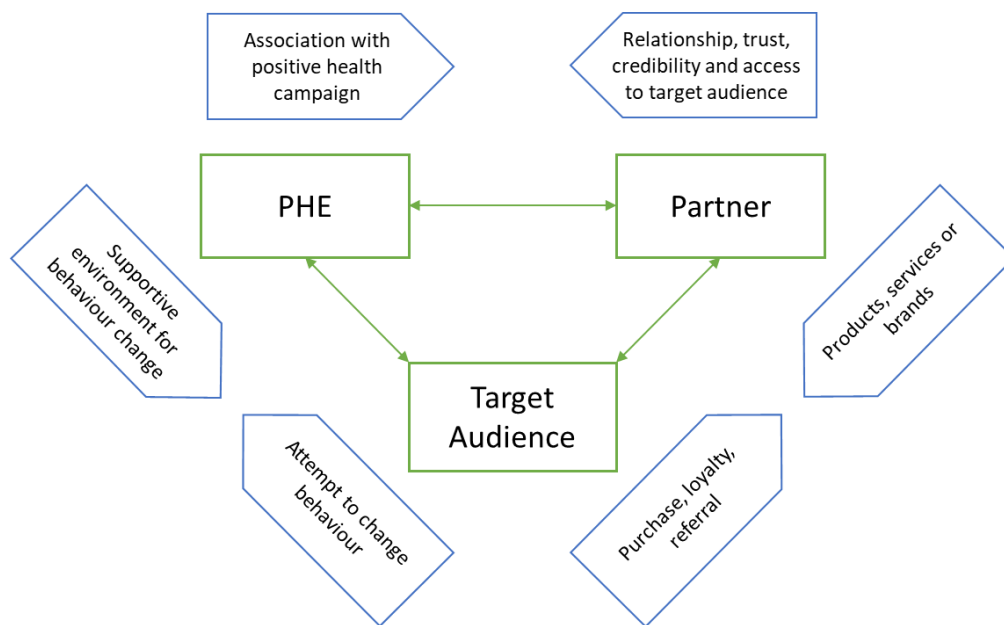


Figure 26: The complex exchange in the relational approach to social marketing taken by PHE

This links to the social marketing literature that suggests social marketers need to create value for their target audiences in order to effect a change in behaviour (French and Gordon, 2015) and that value can be “co-created” (Lefebvre, 2012). PHE’s approach to partnerships is in line with the work of Luca, Hibbert and McDonald (2015, 2016) who propose that in social marketing value needs to be co-created with customers. However, the literature does not specifically reference partnerships as providing the opportunity to create or co-create value either with customers or with the social marketer. Again, the findings suggest PHE are doing something that is not covered by the social marketing literature.

6.2.4 Partnerships provide access to the target audience

A further internal driver of PHE’s approach to partnerships is the PHE Marketing team’s belief that the target audiences for their campaigns are more open to having a conversation about behavioural issues with partners than with PHE themselves or Government. Whilst PHE may be seen by the target audience to be experts in the field of public health they may not be trusted enough by the target audience to be listened to. Partners, on the other hand, although they may not be seen as experts, are trusted by the target audience and listened to. PHE have recognised that partners can affect behaviour change because they have credibility with the target audience and, in light of this, partnerships are now a strategic component of PHE’s approach to social marketing. This is in line with the idea of source credibility identified in the literature review. Expertise and trustworthiness are the key components of source credibility (Pornpitakpan, 2004) where expertise directly influences whether the target audience thinks that the source is worth

listening to and trustworthiness impacts on whether the target audience think they should listen to the advice.

6.2.5 Partnerships support coalitions for change

Another internal driver of partnerships as a component of PHE's social marketing strategy is the PHE Marketing team's ambition to build coalitions of partners. The data suggest PHE believe that the whole (the coalition) can have a greater effect on the target audience than the sum of its individual parts (each partnership). This appears to extend the idea of source credibility to another level. By having many voices giving the same message to the target audience, it may encourage them to listen, understand and take action. Himmelman (2001, p.277) has undertaken research into organisational coalitions and defines coalitions as "an organization of organizations working together for a common purpose". This provides a good description of how PHE see coalitions as part of their national social marketing campaigns.

The data suggest PHE's approach to coalitions has evolved over time. When Change4Life launched in 2009 PHE followed more of a networking/coordination strategy where information was exchanged for mutual benefit and some activities were altered for the common purpose of tackling obesity. PHE are now aiming to build "coalitions for change" suggesting more of a cooperating/collaborating strategy where they work with partners in the exchange of information, developing activities and sharing resources to effect behaviour change. PHE's approach to creating coalitions of partners when trying to tackle complex social problems is similar to that proposed by Bryant et al. (2009) who recommend social marketers create coalitions to support the development and implementation of community interventions. However, PHE's approach to coalitions appears to differ from Bryant et al.'s (2009) in that PHE's is more of a hub and spoke model where PHE hold the ring and communicate with the partners but the partners do not engage with each other.

Having explained the internal drivers that relate to Theme 1 in sections 6.2.2 to 6.2.5 above, the following sections, 6.2.6 to 6.2.11, present the second and first cycle codes used to generate the theme together with supporting evidence from the data. Figure 27 below illustrates, in the form of a thematic map, how Theme 1 was developed from the first and second cycle codes. Figure 27 shows that the analysis of data identified 5 first cycle codes – "Rationale for partnerships"; "Change in social marketing approach"; "Always-on campaigns"; "Target audience"; and "Coalitions of partners". These 5 first cycle codes were brought together under the second cycle code of "Partnerships as strategy", and this was used to generate the theme of "Partnerships is a component of social marketing strategy".

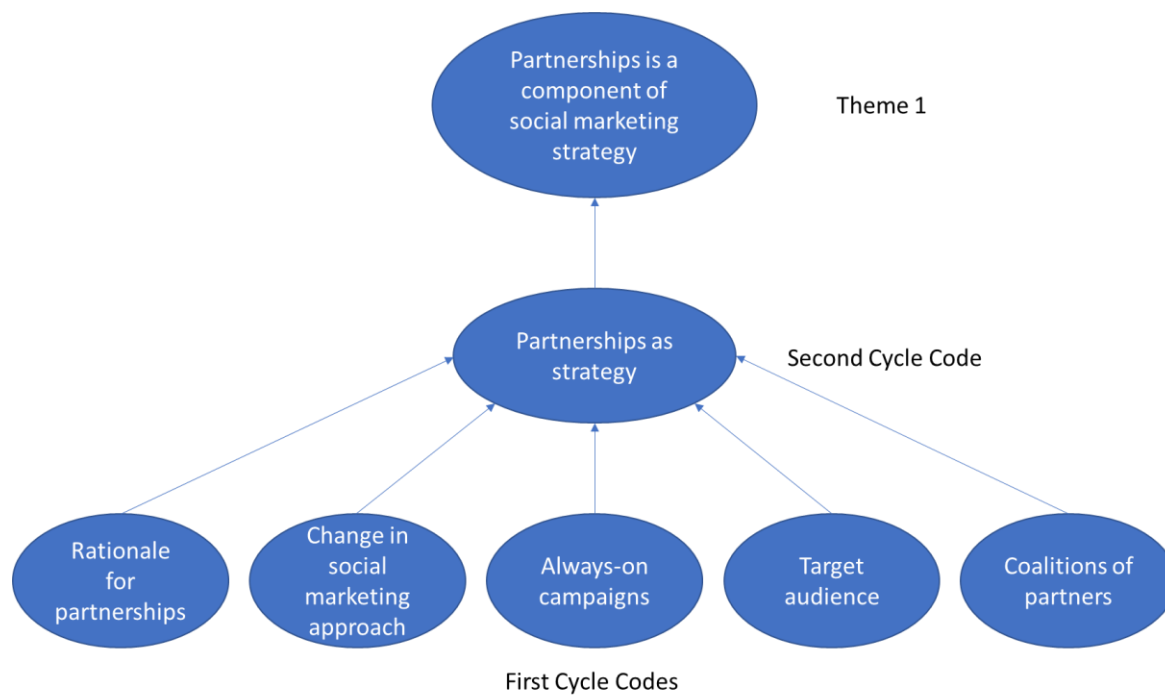


Figure 27: Thematic map - Generation of Theme 1

6.2.6 Second cycle code – partnerships as strategy

The first theme generated from the data attributed to the initial code of antecedents is developed from the second cycle code – “partnerships as strategy”. This second cycle code is a pattern code generated from a bringing together of 5 first cycle codes that describe findings of interest in the data – “rationale for partnerships”; “change in social marketing approach”; “target audience”; “always-on campaigns”; and “coalitions of partners”.

Examples from the data that make up each of these 5 first cycle codes are presented in the following sections: 6.2.7 – rationale for partnerships; 6.2.8 – change in social marketing approach; 6.2.9 – always-on campaigns; 6.2.10 – target audience; 6.2.11 – coalitions of partners. The full data set can be found in Appendix E.

6.2.7 First cycle code – rationale for partnerships

As noted above, the third research question (RQ3) in this study is focused on generating a greater understanding of why PHE create and maintain partnerships to support their national social marketing campaigns. Data relating to this issue were identified in the review of documents and during the observation. In addition, it was the second question asked to participants in the face-to-face interviews. All three data sets suggest the rationale behind why PHE create and maintain partnerships has evolved over time. DOC1 - Change4Life Marketing Strategy 2009 – states the initial rationale for creating partnerships was “to gain access to the partners’ channels” so that Change4Life

messages could be communicated to the target audience via these channels. However, at the time this study was carried out PHE's rationale had changed and DOC8 - PHE Social Marketing Strategy 2017 to 2020 – demonstrates this in asserting *“partners can reach the target audience and influence their behaviours in ways PHE cannot”* and *“provide the right environment to support people in changing behaviour”*.

PHE now see partnerships as a concept that provides an opportunity to effect behaviour change in the target audience because partners are present in the lives of the target audience and can have an impact on their decision making particularly at the point of purchase. This was evidenced in the observation notes, which recorded the statements *“partners have a genuine capacity to effect and support behavioural change”* and *“partners better placed than PHE to motivate behaviour change”*, and in the interviews as illustrated in the following quotations.

“The way that you influence people and their health is via the real brands that they reach and touch every day in their lives, so hearing a message and an offer from [partner name] about healthy eating may well be more motivating than hearing it from a campaign or even from a government funded body. So, the criticality of the messenger and the contextual opportunities to talk to people about health and lifestyle is critically important” (PHE respondent G - Interview 18).

“I think that's where partners are uniquely placed. They are present at those points of purchase, consumption, influence, behaviour change to actually support people, to nudge them, to support them in changing that behaviour in their community, in their workplace, in their school, you know, at their hospital bed, where we can't be, or Public Health England and Department of Health can't be” (Partnerships agency respondent C - Interview 11).

PHE's reason why they create and maintain partnerships in their national social marketing campaigns has changed and it is now to effect a change in behaviour in the target audience.

6.2.8 First cycle code – change in social marketing approach

The data suggest the change in rationale behind why PHE create partnerships was accompanied by a change in PHE's approach to social marketing. DOC1 - Change4Life Marketing Strategy 2009 – purports the initial approach involved a *“strategy to have campaign spikes each year, one in January and one in July, and for partners to support these spikes”*. However, DOC8 - PHE Social Marketing Strategy 2017 to 2020 – highlights that this approach has changed and PHE now *“work with partners who are already engaging with our audiences to mould programmes around the rhythm of their lives rather*

than seeking to persuade people to change their behaviour at points that fit in with campaigns”.

PHE’s approach to social marketing has changed from organising campaign spikes and then creating partnerships to support these spikes to thinking of the concept of partnerships more strategically as a way of delivering campaigns to effect behaviour change. This is evidenced in the interview data as illustrated in the following quotation.

“I think PHE’s strategic decision has been that partnerships are just as important as how you activate and also the strategy and planning function. So, it’s an absolutely fundamental part of the future of how we’re going to deliver things and, actually, I personally think increasingly it will become the only way that we deliver things, that we will become more focussed, we always have at the heart, how can we deliver this with partners?” (PHE Respondent E - Interview 16).

6.2.9 First cycle code - always-on campaigns

Linked to the change in approach to social marketing at PHE is the move to “always-on” campaigns. As noted above, PHE now recognise that to best support behaviour change there is a need to move away from having “spikes” of campaign activity to having year-round activity, particularly using social media and digital platforms, which the target audience can access when they are ready to start their behaviour change journey. Partnerships are seen to be key to this as partners are in constant communication with their target audience and can develop and deliver campaign activity at all times throughout the year.

Initially, PHE’s social marketing communications approach was to have a set number of campaign spikes each year and they created partnerships to support these spikes. As noted in section 6.2.8 above, this is evidenced in DOC1 - Change4Life Marketing Strategy 2009 – which notes a *“strategy to have campaign spikes each year”*. However, DOC6 - PHE Marketing Strategy 2014-17 - demonstrates a change in approach by stating there is a *“shift towards a more year-round content-driven marketing approach”* and DOC8 - PHE Social Marketing Strategy 2017 to 2020 – refers to this new “always-on” approach in the line *“we also create always on partnerships to influence behaviour at point of purchase”*.

The interview data highlighted the rationale for changing from spikes of communication to an always-on approach was because PHE understood this to be a better approach to achieve long-term behaviour change. This is evidenced in the following quotations.

“You are not going to affect the type of behaviour change and engagement that you want if you just do that in a short-term burst” (PHE respondent E - Interview 16).

“We have some partnerships which are what I would describe as always on. In other words, they just run, you know, 365 days a year so it, you know, constantly turns on in digital channels” (Partnerships agency respondent C - Interview 11).

6.2.10 First cycle code – target audience

PHE create national social marketing campaigns to bring about behaviour change in identified target audiences. The data suggest PHE initially created partnerships to provide their campaigns with greater access and reach to these target audiences. However, as PHE’s strategic approach to social marketing changed so did the requirements for partnerships with regards to the target audience. The data suggest the target audience are now at the centre of the reason why PHE create partnerships. Partners are recognised by PHE as having existing and trusting relationships with the target audience, which PHE believe can help support behaviour change. Prospective partners are identified for their reach to the target audience, for their relevance to the target audience and for their potential impact on the target audience. There is now an emphasis on creating and maintaining partnerships with organisations who could support behaviour change in the target audience.

The documentation data demonstrates this change in rationale for creating partnerships. For example, DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011 - includes the line *“commercial brands often have trusting relationships with our key target audiences and can reach them in ways that we cannot”*. Then DOC8 - PHE Social Marketing Strategy 2017 to 2020 – takes this recognition of the trust and relationship that partners can have with the target audience a step further by stating *“our target audience may trust or engage with others more than us: while we are proud of the evidence base behind all the guidance we provide, we also recognise that many in our audiences trust others, whether that’s friends and family, social media, faith leaders, charities or commercial brands, more than they trust government. Rather than fighting this, we work with it”*.

The interview data identified that the rationale for creating and maintaining partnerships was now to leverage the trust that partners have with the target audience to encourage behaviour change. This is illustrated in the following quotations.

“Leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and the credibility that they can provide, to interpret a behaviour change message in their own words through points in time that are highly relevant to getting people to take that action” (Partnerships agency respondent B - Interview 5).

“I think partnerships are going to become more and more important to PHE and Department of Health. It’s not just a function of increasing pressures on budgets but I think it’s also a function of our audience” (Partnerships agency respondent C - Interview 11).

6.2.11 First cycle code – coalition of partners

The data suggest that part of the reason why PHE (and DH before them) create and maintain partnerships is their ambition to build coalitions of partners to support their national social marketing campaigns. This follows a belief by PHE that the whole (the coalition) is greater than the sum of its parts (the individual partnerships). Initially, the idea behind the creation of coalitions of partners was to give the campaigns credibility and to have many voices delivering a consistent message. This idea has evolved to coalitions of partners being able to support behaviour change in the target audience by providing the opportunity for the campaigns to be able to touch every aspect of the target audiences’ lives. These were referred to as “coalitions for change” that could connect people with the campaigns as part of their everyday lives. The coalition could consist of organisations from different industries/sectors such as supermarkets, food and drink manufacturers, schools, pharmacies, leisure operators and entertainment brands, all of whom had influence on people’s lives.

The documentation data highlights the idea that a coalition of partners can support behaviour change. For example, DOC4 states that PHE *“create coalitions of public, private and third sector organisations to drive change and engage the public wherever they are”*. This is taken a step further in DOC8 with the reference *“we will work in partnership to build coalitions for change”*.

One rationale for creating a coalition of partners was identified in the observation data. When PHE were developing a new campaign, One You, they wanted it to be present in all aspects of the target audiences’ lives and it was determined that having a coalition of partners was one way to achieve this. It was noted *“building the coalition – One You needs to live in people’s lives and touch every aspect of people’s lives”*. The interview data supports the idea that a coalition of partners can affect behaviour change and provide a campaign with credibility, as exemplified in the following quotations.

“You need a range of partners who are providing solutions to help, you know, provide a solution to that problem. So, I guess that’s where the coalition was built” (Partnerships agency respondent A - Interview 2).

“So that coalition allows for that credibility of the offering because it’s a number of different partners working together rather than one” (Partnerships agency respondent D - Interview 19).

The change to partnerships as strategy has been reflected in a change as to how the PHE Marketing team define partnerships in the context of their national social marketing campaigns and this will be presented and evidenced in the next section of this chapter under Theme 2.

6.3 Theme 2 - The definition of partnerships has evolved to reflect the change to partnerships as strategy

The second research question in this study (RQ2) asks – how might partnerships be defined by an executive government agency in their national social marketing campaigns? The findings highlight that the PHE Marketing team have evolved their thinking with regards to partnerships and now see it as a concept that is integral to their social marketing strategy. The data suggest the way PHE define partnerships has evolved over time and this evolution reflects the change to partnerships as strategy.

The findings demonstrate that PHE have not defined this concept of partnerships as strategy and, in addition, have no agreed definition of what a partnership is in relation to their national social marketing campaigns. The reason for this could be that the definition of partnerships has not been static but has changed as the rationale behind why partnerships are created in social marketing has changed. The absence of an agreed definition of partnerships at PHE is consistent with the review of social marketing literature in this study where no standard definition was identified (Duane, 2012).

However, the documentation, observation, and interview data demonstrate changes in how the concept of partnerships is viewed at PHE and these are reflected in changes to how partnerships are referred to and so defined. Question 8 in the face-to-face interviews asked participants to define a partnership in the context of PHE’s national social marketing campaigns and these definitions show a change to the way partnerships are viewed. Partnerships are now seen as a strategic concept that is distinct from the individual partnerships themselves.

This study proposes the following definition of PHE’s concept of partnerships as strategy:

Partnerships as strategy is a macro-level approach that views the idea of partnerships as a whole rather than seeing it as simply the individual partnerships.

PHE utilise this concept of partnerships as strategy to adopt a relational approach to their national social marketing campaigns. PHE leverage the trust and credibility of partners to

co-create an exchange that provides value to all parties and encourages commitment in the target audience to effect a positive change in their behaviour.

This finding of partnerships as a concept is significant as the review of social marketing literature found no reference to the concept of partnerships or of partnerships being considered strategic. Instead the literature presents partnerships simply as an element of the tactical social marketing mix.

The data suggest that PHE (and the DH before them) initially viewed partnerships in the same way as presented in the literature. PHE saw partnerships as a social marketing tactic to deliver campaign messages through the partners' channels. Two of the documents analysed in this study, DOC2 published in 2010 and DOC4 published in 2011, provide definitions of partnerships that reflect this approach. For example, in DOC2 - Change4Life One Year On 2010 - partnerships were defined as "*the creation and dissemination of messages and offers by Change4Life partners*". This reflects that partnerships were seen at the time as a promotional tool to provide PHE with access to the partners' communications channels to the target audience.

However, the data show a change in how partnerships are referred to by the PHE Marketing team and hence how they are defined, which led to the development of the theme "the definition of partnerships has evolved to reflect the change to partnerships as strategy". This change was first identified in DOC6 – PHE Marketing Strategy 2014-17 – which stated, "*Partnerships included as one of the core principles of the strategy*". The interviews provided definitions that demonstrate the change in how PHE see partnerships and this is evidenced in the following quotation:

"A realisation that actually partnerships needed to be at the core and was a strategic marketing tool as opposed to being on the fringes and a tactical marketing tool" (Partnerships agency respondent C - Interview 11).

The data highlight that this change in the way the concept of partnerships is viewed by the PHE Marketing team is reflected in the way the individual partnerships are defined. As noted previously, this study found no single, stated definition of partnerships used by PHE. However, the data identified that adopting the concept of partnerships as strategy required the PHE Marketing team to change their focus and concentrate on creating and maintaining "strategic partnerships" to effect a change in behaviour of the target audience. The evidence supporting this change to strategic partnerships will be presented in section 6.5 of this chapter and they demonstrate a number of key characteristics of the strategic partnerships created by PHE. These characteristics are "mutual benefit", "shared objectives", "collaboration", "relationship", "exchange", and "work together". From these

characteristics it is possible to formulate a definition for the strategic partnerships that PHE are creating and maintaining and the proposed definition is as follows:

A strategic partnership in social marketing is a long-term relationship between two organisations with a shared objective to effect behaviour change in a target audience and where a complex exchange takes place and value is co-created to provide mutual benefit for all parties.

This definition is made up of a number of components and the meanings of these as they relate to the definition are as follows:

Long-term relationship – the way in which two or more organisations work together for a period of at least 12 months to achieve a joint goal

Shared objective – something understood in the same way that two or more organisations plan to do

Complex exchange – the transfer of tangible or intangible value between at least three parties

Value – the perceived tangible and intangible benefits and costs of something

Co-creation – making something new together

Mutual benefit – a positive outcome for two or more parties.

The PHE Marketing team have continued to see partnerships as a marketing tactic as well as a strategic concept. In line with this PHE continue to create what they refer to as “Signposting Partnerships” and still see a role for these in their national social marketing campaigns. This study proposes a definition for the signposting partnerships created by PHE as follows:

A signposting partnership in social marketing is a short-term relationship between two organisations where a restricted exchange takes place that provides value to both parties.

The three definitions proposed by this research for – (i) the concept of partnerships as strategy, (ii) strategic partnerships, and (iii) signposting partnerships - support the advancement of knowledge with regards to the second research question in this study. However, as this research follows the Critical Realist philosophy it is acknowledged that these definitions are developed from observations made at the empirical level and are therefore fallible as they may not represent what is happening at the actual level.

The evidence from the data and the thematic analysis that support this theme is presented in sections 6.3.1 and 6.3.2 that follow to provide transparency as to how the theme and definition were developed.

6.3.1 Second cycle code – definition of partnerships

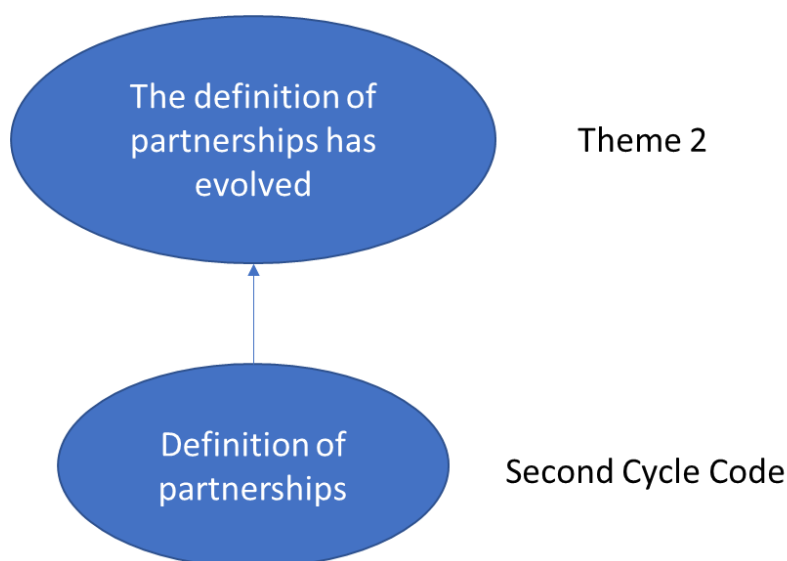


Figure 28: Thematic Map - Generation of Theme 2

Figure 28 above illustrates in the form of a thematic map how the theme of “the definition of partnerships has evolved” was developed from a second cycle code. This second cycle code is a pattern code generated from a first cycle code of the same name that described findings of interest in the data set. Examples from the data that make up this first cycle code are presented in section 6.3.2 below and the full data set can be found in Appendix E.

6.3.2 First cycle code – definition of partnerships

As noted above, the data suggest the definition of partnerships used by PHE has changed over time. The initial definitions used by PHE (or DH as it was then) were identified in the documentation data. DOC2 - Change4Life One Year On 2010 – referred to the approach taken to partnerships as *“partnership marketing (the creation and dissemination of messages and offers by C4L partners)”* and this was echoed in DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011 – which portrayed partnerships as *“Partnership marketing – marketing activity where two or more organisations campaign together to support shared aims. Usually no money changes hands between them”*. Both the definitions refer to the use of partnerships as “partnership marketing” and include the components of - “two or more organisations”, “shared aims”, “creation and dissemination of messages” and “no money changes hands” - as key to partnerships. These initial definitions reflect the definition of partnership marketing being used by the UK Cabinet Office at the time. This definition was identified in the observation data and states that partnership marketing is *“the development and*

delivery of government messages via partnerships with private and public sector organisations, using a partner's range of marketing channels, generally for free" (Cabinet Office, 2007 p.5).

As noted in section 6.2 above, the findings in this study highlight a change in the reason why PHE create partnerships from accessing partners' channels to providing the opportunity to effect behaviour change. This change led to an evolution of how partnerships are defined by the PHE Marketing team and this change is demonstrated in the following quotations.

"The definition of partnerships is something that very much evolves and has evolved since the... since I've been in post" (PHE respondent F - Interview 17).

"It's [the definition] changed quite a bit over the years" (Partnerships agency respondent B - Interview 5).

As noted above, Question 8 in the face-to-face interviews asked the participants to define a partnership in the context of PHE's national social marketing campaigns. Example responses include:

"So, I would say a partnership is a collaboration between two organisations, where there is shared objectives. Or there is a mutual benefit created for both parties" (PHE respondent A - Interview 1).

"What underpins them all is having some shared objectives that each side is working towards" (PHE respondent C - Interview 14).

"It's a mutually beneficial strategic relationship between organisations, as opposed to being, you know, a tactical relationship between one campaign team and another campaign team to execute a particular campaign" (Partnerships agency respondent C - Interview 11).

These quotations demonstrate the strategic nature of the partnerships that the PHE Marketing team are now looking to create and the change from the tactical use of partnerships to strategic partnerships. The different types of partnerships being created by PHE will be presented and evidenced in the next section of this chapter under Theme 3.

6.4 Theme 3 – The typology of partnerships has evolved to reflect the change to partnerships as strategy

Theme 1 above highlights that partnerships is a component of PHE's social marketing strategy and this has informed the generation of third theme - the typology of partnerships has evolved to reflect the change to partnerships as strategy. Figure 29 below illustrates,

in the form of a thematic map, how this theme was developed from the first and second cycle codes. Figure 29 shows that the analysis of data identified 3 first cycle codes – Signposting partners; Strategic partners; and Categories of partner. These 3 first cycle codes were brought together under the second cycle code of “Typology of partnerships”, and this was used to develop the theme of “The typology of partnerships has evolved to reflect the change to partnerships as strategy”.

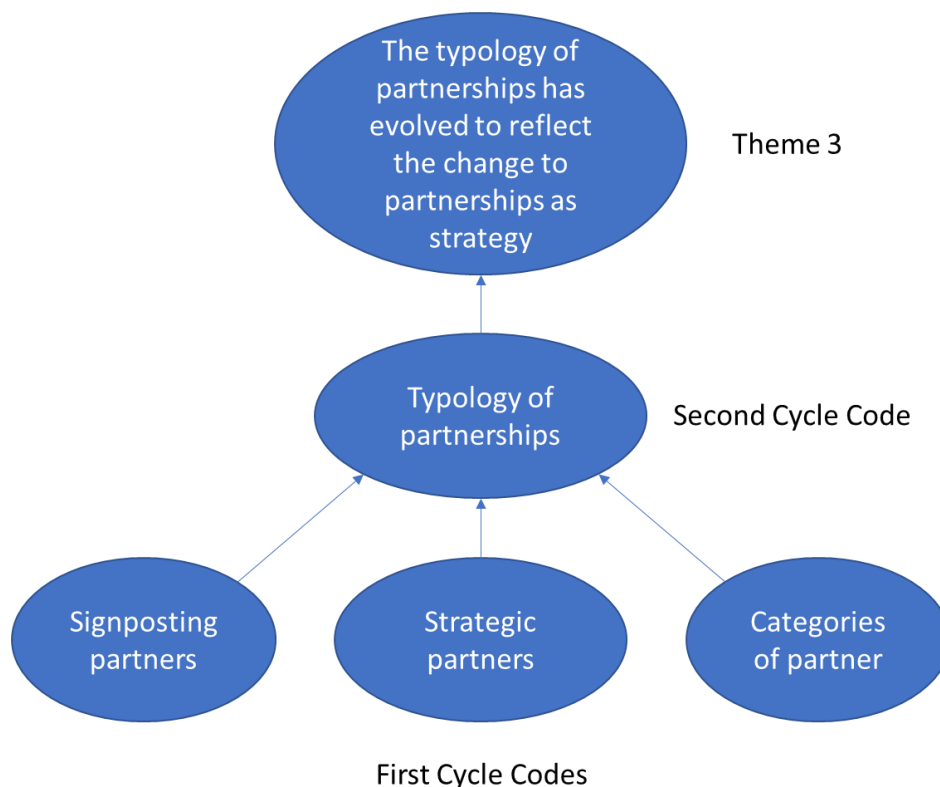


Figure 29: Thematic map – Generation of Theme 3

The findings suggest the typology of partners has evolved with the change in rationale behind why PHE create partnerships. The data identified two partner types at PHE – signposting partnerships, and strategic partnerships. Signposting partnerships are created by the PHE Marketing team to communicate campaign messages through the partners’ channels. They are usually short-term partnerships that exist for a single campaign. Strategic partnerships are more long-term and are created and maintained to effect behaviour change in the target audience. Initially, PHE wanted to access partners’ channels to push out their campaign messages. This required a large number of “signposting” partnerships to get the messages out to as many of the target audience as possible, as often as possible. When the rationale changed to creating partnerships to effect behaviour change PHE needed a smaller number of “strategic” partnerships where they could work more closely with a partner over a long period of time. One of the key implications of this change was the need for PHE to reallocate resources away from the creation of signposting partnerships to the maintenance of the strategic partnerships.

The social marketing literature identifies two types of social marketing partnership – intervention-led and relational (Duane, 2012). The intervention-led partnership involves the social marketer developing a partnership with an organisation to supply a product/service or act as a distribution point to the target audience for one specific programme or campaign. The relational partnership sees the social marketer developing a partnership that has a more strategic, long-term focus. In addition, Duane (2012) identified four taxonomies of partnerships in social marketing – (i) Non-profit competition; (ii) Partnership continuum; (iii) Goal convergence, trust and contacts; and (iv) Multi-relationship – each with distinct characteristics.

The findings in this study suggest that PHE's signposting and strategic partnerships are in line with the intervention-led and relational partnerships documented by Duane (2012). However, the findings relating to PHE appear to be unique as they suggest the rationale behind the creation and maintenance of strategic partnerships by the PHE Marketing team differs from that identified by Duane (2012) with regards to relational partnerships. PHE see their strategic partnerships as providing the opportunity to effect a change in behaviour whereas the relational partnerships found by Duane (2012) appear to be less strategic and more of a tactical, promotional tool for the campaigns. In addition, the typology of partnerships identified at PHE has commonalities with elements of each of Duane's (2012) four taxonomies. For example, PHE's typology of strategic partnerships and signposting partnerships could be seen as being at two ends of a spectrum of a partnerships continuum. PHE aim to build long-term relationships with strategic partners, which requires mutual benefit, trust, cooperation, sharing resources and personal contacts. PHE have a Partnerships Team who prioritise partners and partner needs within the development of social marketing campaigns and the strategic partnerships PHE create with commercial partners have formal agreements.

In contrast to Duane (2012), the findings in this study suggest that under certain conditions, for example a national social marketing campaign to tackle a complex social problem by effecting a change in behaviour of a target audience, the PHE Marketing team create and maintain a small number of strategic partnerships. However, given other conditions, for example a national marketing campaign to communicate out a message to a target audience, the PHE Marketing team create a large number of signposting partnerships.

The findings also suggest PHE create strategic and signposting partnerships within three general sectors of industry – private sector, public sector and third sector. The PHE Marketing team have a different approach to partnerships within each sector. Partnerships with organisations in the private sector are more formal with clear governance procedures. Partnerships with organisations in the public sector are less formal.

6.4.1 Second cycle code – typology of partnerships

Theme 3 – “the typology of partnerships has evolved to reflect the change to partnerships as strategy” – is developed from the second cycle code – “typology of partnerships”. This second cycle code is a pattern code generated from a bringing together of 3 first cycle codes that described findings of real interest in the data – “categories of partner”; “signposting partners”; and “strategic partners”.

Examples from the data that make up each of these 3 first cycles codes are presented in the following sections: 6.4.2 – categories of partner; 6.4.3 – signposting partners; 6.4.4 – strategic partners. The full data set can be found in Appendix E.

The data suggest the type of partnerships PHE create and maintain has changed over time to reflect the change to partnerships as strategy and PHE now have two types of partnership. Initially, PHE wanted to access partners’ channels to communicate out their campaign messages to the target audience and looked for *signposting partners* to achieve this. However, PHE now see partners as having the potential to effect a change in the behaviour of their target audience and are looking for *strategic partners* to achieve this. Within these two types of partnership there are three distinct *categories of partner* - commercial partners, public sector partners and third sector partners.

6.4.2 First cycle code – signposting partnerships

The initial type of partnerships created by PHE (or DH as it was) were signposting partnerships. When Change4Life was launched in 2009 there was a need to create a large number of partnerships with organisations who could push Change4Life messages out to the target audience through their owned channels. These type of partners were referred to as signposting partners and the partnerships created with them were often short-term, just for the duration of a campaign burst, and required little resource from PHE to create. The following quotations provide examples of the evidence behind this code.

“There's signposting partners, we can give them a number of assets or a toolkit and they will simply display those messages for us; which, you know, is still really important because it gets messages across the target audience, but it doesn't need as much management and handling of that particular partner” (Partnerships agency respondent A - Interview 2).

“Signposting partners ... help those campaigns go further at a grass roots level. And so, signposting partners are also those that can simply be used to activate the campaign and amplify the campaign in their channels, simply using our messaging, in a way that they see best suits them” (Partnerships agency respondent D - Interview 19).

“What we call signposting partners is hugely important...because that credibility and that frequency of message that we deliver through a number of partners sharing our content in their channels is still vital, and so, that is something that we still place huge value on” (Partnerships agency respondent D - Interview 19).

Signposting partnerships are still of importance to PHE but the change to partnerships as strategy required a change in focus from creating a large number of signposting partnerships to concentrating resources on creating and maintaining a small number of strategic partnerships. This will be presented in the next section.

6.4.3 First cycle code – strategic partnerships

The change to partnerships as strategy at PHE and the idea that partnerships could affect behaviour change led to PHE creating and maintaining strategic partnerships. This type of partnerships was created with a small number of partners who PHE identified as having the potential to effect behaviour change in the target audience. Strategic partnerships are viewed as being long-term in nature and require significant investment from PHE in time and resources to build and maintain a relationship with the partner. PHE deemed this investment to be of great importance because of the time it takes to deliver behaviour change. The following quotations provide examples of the evidence behind this code.

“Partnership is a strategic long-term one...trying to change people's behaviour can't happen overnight, so therefore your partnership should not just be an overnight thing” (PHE respondent E - Interview 16).

“A longer-term strategic relationship gives you the opportunity to develop things in a very bespoke way for that partner and for Public Health England as well. So, you're more likely to be successful in what you're trying to do if you have a longer-term relation, because you get to know each other a hell of a lot more... so, you just get a better-quality relationship when it's a longer-term relationship” (Partnerships agency respondent A - Interview 2).

“You've got a few very big strategic partners who deliver high impact, high value partnership activity” (PHE respondent F - Interview 17).

“I think it's long-term strategic partnerships on big issues such as eating healthier, stopping smoking... longevity is actually really important...you've been on that journey together, you've got learnings, you know what happened in the past campaign, and you've got the knowledge of each of the organisations and how they work” (Commercial partner respondent B - Interview 8).

6.4.4 First cycle code – categories of partner

The data highlight that there are three broad industry sectors within which PHE aim to create both strategic and signposting partnerships – commercial sector; public sector; and third sector. These three sectors were also identified in the social marketing literature (French et al., 2009) and were used in this study as criteria to support the selection of interview participants. The following quotations provide examples of the evidence behind this code.

“Commercial sector, voluntary sector and local authority partnerships” (DOC8 - PHE Social Marketing Strategy 2017 to 2020).

“So, there is commercial private-sector partners, public sector and NGOs” (PHE respondent D - Interview 15).

“Commercial partnerships ... partnerships with not-for-profit organisations ... local partnerships” (Partnerships agency respondent C - Interview 11).

As the typology of partnerships created by the PHE Marketing team changed so did the selection process for identifying prospective partners to reflect the change to partnerships as strategy. This change will be presented and evidenced in the next section of this chapter under Theme 4.

6.5 Theme 4 – The selection process for partnerships has evolved to reflect the change to partnerships as strategy

Theme 1 in this study highlights that partnerships is a component of PHE's social marketing strategy and this informed the generation of the fourth theme - the selection process for partnerships has evolved to reflect the change to partnerships as strategy. Figure 30 below illustrates how this theme was developed from the first and second cycle codes in the form of a thematic map. Figure 30 shows that the analysis of data identified 2 first cycle codes – Partner selection, and Co-creation. These 2 first cycle codes were brought together under the second cycle code of “Selection criteria”, and this was used to develop the theme of “the selection process for partnerships has evolved to reflect the change to partnerships as strategy”.

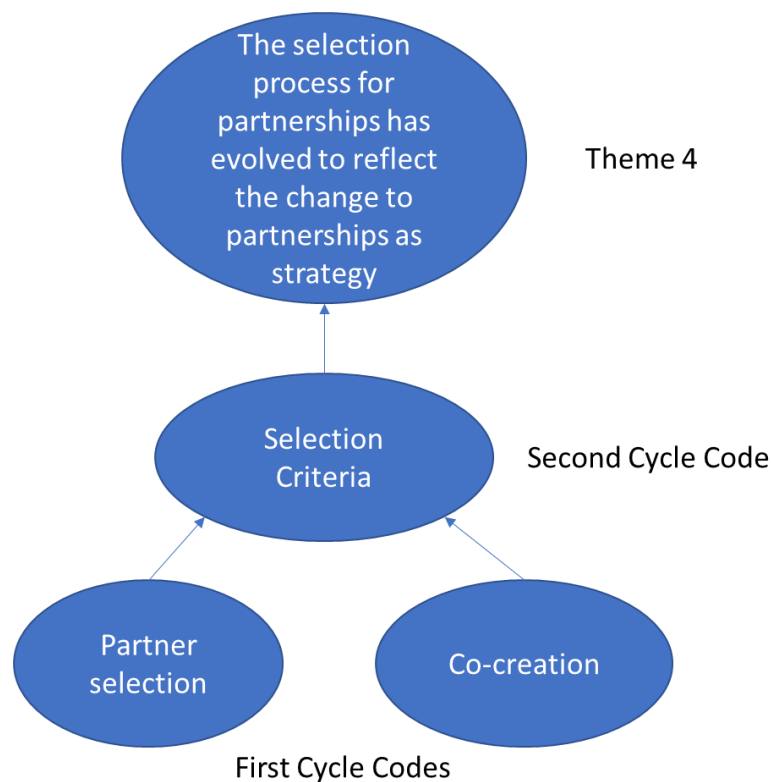


Figure 30: Thematic map – Generation of Theme 4

The findings suggest that PHE have criteria for selecting prospective strategic and signposting partners they want to create and maintain partnerships with. This criterion has evolved over time to reflect the change in rationale behind why PHE create partnerships as part of their national social marketing campaigns. In 2009 when the Change4Life campaign was launched the rationale for partnerships was to gain access to the partners' channels to push out Change4Life messages to the target audience. The criteria for selecting prospective signposting partners included "reach" and "scale". PHE selected prospective partners on the basis of the reach of their channels to the target audience and the scale that their channels could give to the campaign. There was also an attempt to get as many partners on board as possible.

PHE's selection criteria have become more strategic to reflect the change in rationale behind why PHE create partnerships. PHE see partnerships as providing the opportunity to effect a change in the behaviour of the target audience and are now looking for prospective strategic partners who have the potential to effect behaviour change with their target audiences and with whom they can co-create campaign activity. They do this by putting the target audience at the centre of the selection criteria and the new selection criteria is presented as a model in Figure 31 below.

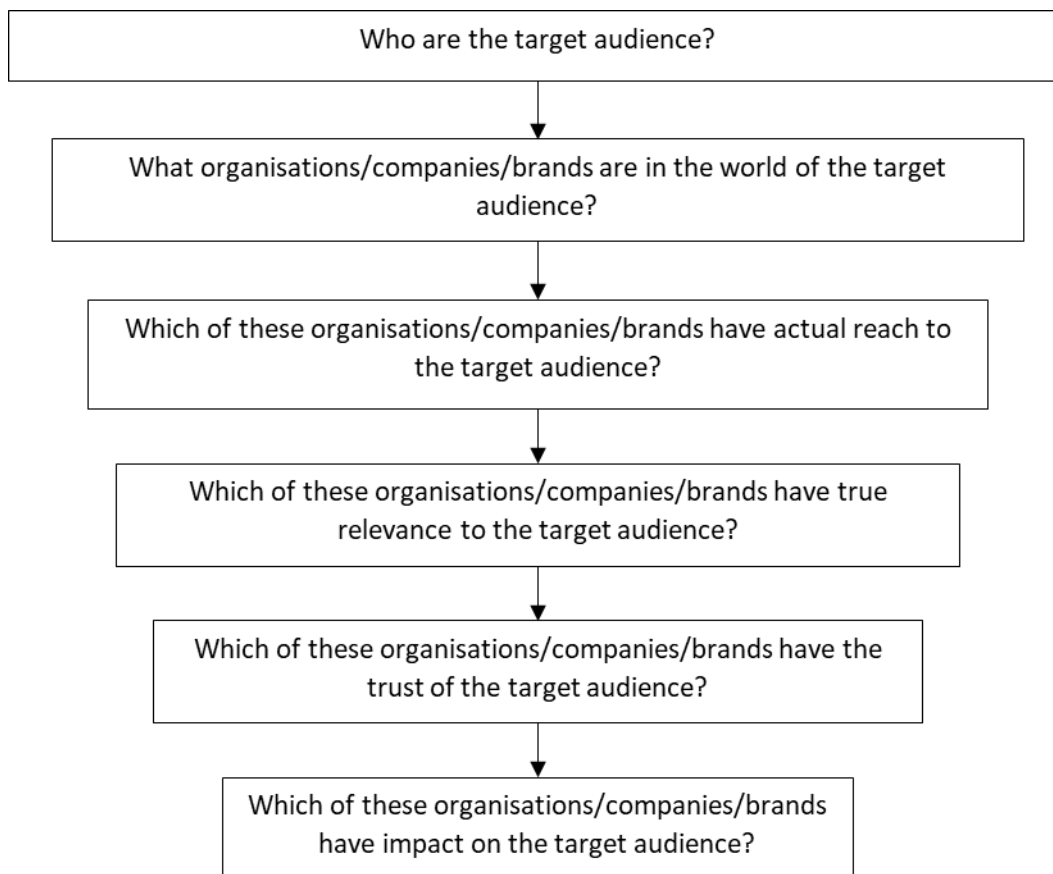


Figure 31: Model of criteria used for strategic partner selection by the PHE Marketing team

As can be seen in Figure 31 above, PHE start their partner selection criteria by identifying the target audience whose behaviour they are looking to change. They then identify the organisations, companies and brands who are in the world of this target audience. Next, they apply the criteria - reach to the target audience, relevance to the target audience, trust by the target audience and impact on the target audience. Using these criteria the PHE Marketing team identify the potential strategic partners who have the best prospect to effect behaviour change. Once a shortlist has been created these prospective strategic partners are assessed for risk to PHE. Finally, PHE approach those partners where they feel there is the greatest opportunity to co-create value to the target audience that will encourage and support a change in their behaviour. As noted in 2.7.3 above, Lefebvre (2012) proposed the need for social marketers to co-create value with their target audience, however, he does not specifically identify partnerships as a potential way of doing this. The findings in this study suggest that PHE look to co-create value through partnerships and that value can be co-created between PHE and the partner as well as the partner and the target audience. This highlights that there is a complex exchange involved.

The findings in this study relating to PHE's approach to partner selection appear to be unique to their approach to social marketing strategy as the literature review found no

explicit model for selecting partners in social marketing campaigns. There are commonalities between PHE's partner selection model and the NSMC's framework for the development of social marketing programmes, as presented in their Consumer Triangle (NSMC, 2011) shown as Figure 1 in section 2.2.1 above, with its focus on the target audience. The findings in this study suggest that the focus social marketers have on the target audience should be extended to their selection of prospective strategic partners and this needs to be carried out prior to the start of any campaign development.

6.5.1 Second cycle code – selection criteria

Theme 4 – “the selection process for partnerships has evolved to reflect the change to partnerships” – is developed from the second cycle code – “selection criteria”. This second cycle code is a pattern code generated from a bringing together of two first cycle codes that described findings of real interest in the data – “partner selection” and “co-creation”.

Examples from the data that make up each of these 2 first cycles codes are presented in the following sections: 6.5.2 – partners selection; 6.5.3 – co-creation. The full data set can be found in Appendix E.

The data suggest PHE have changed their *partner selection* criteria to reflect the change in rationale behind why they create and maintain partnerships, particularly with respect to their aim of the *co-creation* of campaigns with partners. The literature review did identify proposed criteria for selecting social marketing partners (Weinreich, 1999), which the data suggest had similarities with the partner selection criteria initially used by PHE. This initial criteria included - access to the target audience; credibility with the target audience; and resources/skills available to the campaign. However, the data identify that PHE now use different selection criteria for their strategic partnerships to that found in the social marketing literature and the model in Figure 31 above shows that this consists of - (i) actual reach to the target audience; (ii) true relevance to the target audience; (iii) trust of the target audience; and (iv) impact on the target audience.

6.5.2 First cycle code – partner selection

When PHE were creating partnerships in order to access the partners' channels, there was an aim to create as many signposting partnerships as possible with organisations that had direct channels to the target audience. This change was identified in the interview data and an example quote is provided to illustrate this below:

“From the outset we were just, you know, let's just get as many partners as possible. You know, eight or nine, ten years ago it was like, you know, please

come and do, you know, join us in this but now I think we are much more sophisticated in that we've got established relationships, so our model has changed in terms of the mapping process" (PHE respondent E - Interview 16).

With the shift to PHE creating partnerships to effect behaviour change the reason why partners are selected has changed. PHE now select prospective strategic partners based on the partners' potential to influence the behaviour of the target audience.

The observation data highlight that PHE are looking for *"organisations with a genuine capacity to effect and support behavioural change"*. To achieve this PHE create a "touchpoint map" where they look at the lives of the target audience and map out all the points of contact they have with potential partners. This might include a point of purchase with a retailer or attendance at a children's nursery. The specific data related to the touchpoint map are presented in section 7.3 of the next chapter as part of the Partnerships Development Process, however, the idea is evidenced in the following quotation.

"Looking at it through the lens of the consumer or customer and what the journey is that they would go through" (Partnerships agency respondent D - Interview 19).

6.5.3 First cycle code – co-creation

When PHE were creating signposting partnerships to access partners' channels they created these partnerships after the campaigns were developed. However, with the change to partnerships as strategy and the shift from campaign spikes to always-on campaigns PHE are now looking to co-create campaigns with partners. PHE are creating strategic partnerships with partners who have the potential to effect behaviour change with their target audiences and with whom they can build a long-term relationship to co-create campaign activity. This was identified in DOC8 - PHE Social Marketing Strategy 2017 to 2020 – which includes the statement *"we have moved from a model whereby partners amplify our programmes and distribute our messages to co-creating programmes across a breadth of sectors"*. The interview data also demonstrated this move to the co-creation of campaigns with partners and is evidenced in the following quotations.

"Once you then establish that you both want to work on the same thing, you go into campaign creation and co-creation and that's very much about a series of workshops, coming up with a sort of strategic idea that can hold the whole partnership together and then working on the tactics that would end up delivering it to the consumer" (PHE respondent F - Interview 17).

"A great opportunity for them to really come in and create something with us which—co-create something with us—which they, we, effectively together would

own. So that then led to 10-minute Shakeup, which was, really, a very successful campaign” (Partnerships agency respondent C - Interview 11).

The social marketing literature suggests partnerships can support all areas of the marketing mix (Abercrombie et al., 2012). However, the data suggest PHE take a different approach and rather than supporting the marketing mix, partners are involved in co-creating the social marketing campaigns.

6.6 Theme 5 – The change in context of partnerships has impacted on why partnerships are created and maintained

The change to partnerships becoming a core component of PHE’s social marketing strategy was found to have been impacted upon by changes in the macro-environment in which PHE operate in. This led to the fifth theme generated from the data attributed to the initial code of antecedents - the change in context of partnerships has impacted on why partnerships are created and maintained. Figure 32 below illustrates, in the form of a thematic map, how this theme was developed from the first and second cycle codes. Figure 32 shows that the analysis of data identified 7 first cycle codes – Uncertainty; Political change; Economic climate; Social change; Technological developments; Resistance to partners; and Budget cuts. These 7 first cycle codes were brought together under the second cycle code of “Context of partnerships”, and this was used to develop the theme of “the change in context of partnerships has impacted on why partnerships are created and maintained”.

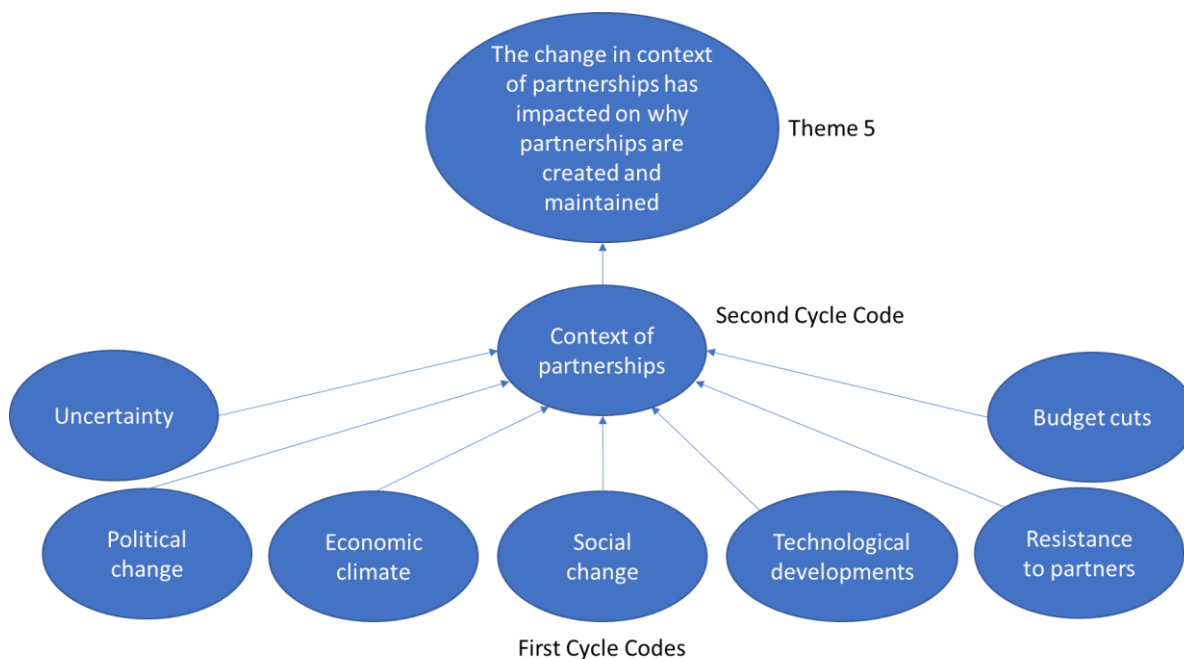


Figure 32: Thematic map – Generation of Theme 5

The findings suggest the evolution in the reason why PHE create and maintain partnerships as part of their national social marketing campaigns has been impacted by the change in context of the environment in which they are operating in. The antecedents data suggest PHE are operating in an environment of *uncertainty* linked to factors including *political change*, *economic climate*, *social change*, *technological developments*, *budget cuts* and *resistance to partners*. This environment has had an impact on the rationale behind why PHE create and maintain partnerships. PHE had to adapt to the change in context and take a different strategic approach to social marketing. One way they adapted was to see partnerships as providing an opportunity to effect behaviour change and as such partnerships became a core component of PHE's social marketing strategy.

The need for public-sector organisations to adapt to changes in their context is consistent with Strategic Management theory, as context affects the "strategic space" the organisation operates in (Ferlie and Ongaro, 2015, p.122). This strategic space relates to the amount of freedom a public sector organisation has to develop its own strategic approach and this depends on its autonomy, the public and political expectations it has, and its obligations and accountability. PHE, as a newly created executive government agency, appeared to have a greater level of autonomy than DH, particularly at the operational level, and this enabled it to take a more strategic approach to the use of partnerships to support its national social marketing campaigns. In addition, the experience and learning that PHE, and DH before them, have developed over time with regards to the development of social marketing campaigns and the use of partnerships to support these campaigns appears to have influenced their approach to developing social marketing strategy. PHE's approach to social marketing strategy and the use of partnerships has evolved in-line with Mintzberg's concept of "logical incrementalism" where strategy is seen as a process of leaning over a period of time.

The Marketing theory also stresses how context and macro-environmental factors have impact on the market an organisation operates in and highlights that the organisation has no control over these factors (Chernev, 2018). When changes take place in the macro-environment the organisation needs to make decisions to adapt to these changes. Agostini and Nosella (2017) also highlighted environmental conditions in their study of Marketing IORs. The social marketing literature recognises the importance of understanding the marketing environment and seeing the bigger picture when undertaking strategic planning and identifies the need to carry out a situational analysis on the macro-environment prior to any campaign development (Hastings and Domegan, 2014; 2018). The literature review also identified the concept of macro-social marketing (Kennedy, 2016), which recognises the need for social marketers to work in a more holistic way by

considering all aspects of the environment in relation to the social problem being tackled. This study of PHE found that consideration also needs to be given to the impact of context and the macro-environment on the social marketing organisations themselves and their approach to social marketing strategy.

6.6.1 Second cycle code – context of partnerships

Theme 5 - the change in context of partnerships has impacted on why partnerships are created and maintained – is developed from the second cycle code – context of partnerships. This second cycle code is a pattern code generated from a bringing together of 7 first cycle codes that described findings of real interest in the data – uncertainty; political change; economic climate; social change; technological developments; resistance to partners; and budget cuts. Examples from the data that make up each of these 7 first cycle codes are presented in sections 6.6.2 to 6.6.8 below and the full data set can be found in Appendix E.

6.6.2 First cycle code - uncertainty

The findings highlight that PHE were operating in an uncertain environment at the time of this study. The uncertainty was linked to other first cycle codes including political change, economic climate and budget cuts, which will be presented later in this chapter. The uncertainty appeared to be having a particular impact on the PHE Marketing team. For example, a new campaign, One You, was planned to launch in January 2016, however, the PHE Marketing team voiced concern as to whether this would happen and expressed that the lack of clarity was impacting on conversations with partners. The campaign launch was eventually put back to March 2016 and this led to a change in the planned timings for other campaign activity. This was not the only example of uncertainty and the PHE Marketing team conveyed that changes to launch dates and timings of campaign activity had impacted on the support partners provided to all the campaigns. Partners expressed nervousness to commit themselves to deliver activity in case timings changed again. There was concern amongst the PHE Marketing team that they were losing trust and momentum with partners and there was a lack of ability to plan ahead. The uncertain environment had clear implications for the partnerships as evidenced in the following quotations and observations.

“I mean I think there's definitely uncertainty now...suddenly you get landed with something like Brexit, which just, kind of, dries, like brings the machine to a halt. And that can have quite a negative impact when you're, sort of, pushing back timelines and you're pushing back commitments” (PHE respondent A - Interview 1).

“Clearly times are going to get really challenging with all the uncertainty that comes with Brexit” (PHE respondent E - Interview 16).

“There have been campaigns that...we just haven’t had a date for. I think Active 10 was one of those actually. I think it was supposed to launch early in the year in sort of April. And then because of elections and purdah [the period of sensitivity prior to a general election where all government department communications are restricted] and all the rest kept getting put off and then eventually it didn’t happen until September...I think that is something that can go wrong and it can create uncertainty, so, yeah, I think that does have an impact certainly” (Commercial partner respondent E - Interview 21).

One You – change of launch date – letting partners know – lose trust and momentum (Observation data).

The relationship marketing literature identified uncertainty as having a negative impact on trust in business relationships (Morgan and Hunt, 1994). The findings in this study highlight uncertainty as a factor that was impacting on PHE and the partnerships they created. During this study, the PHE Marketing team faced restrictions in their communications to partners due to two General Elections (in 2015 and 2017) and the EU Referendum (in 2016). These also caused planned campaigns to be delayed. However, the data suggest that PHE managed this uncertainty with partners through the relationships that had been developed, particularly the personal relationships that had been created, and this reduced the impact of the uncertainty. However, uncertainty was seen as having negatively impacted the outcomes of some of the partnerships. Examples from the data that exemplify these points are provided in the quotations below.

“Managing uncertainty, again, it’s just being clear about, like, what the situation is” (PHE respondent A - Interview 1).

“Honesty. Honestly, it’s honesty. That’s the best way, I think. You’ve got to be able to have that honest conversation with the partner, and to let them know what’s going on” (Partnerships agency respondent A - Interview 2).

“We know it [uncertainty] does have implications in terms the outcomes of the programme” (Commercial partner respondent A - Interview 4).

Duane’s (2012) adaption of Morgan and Hunt’s (1994) KMV model for Social Marketing Partnerships replaced uncertainty with tension, however, the findings in this study demonstrate that uncertainty does impact on partnerships in social marketing and the creation and maintenance of long-term partnerships helps in limiting this impact.

6.6.3 First cycle code - political change

The findings highlight that PHE, as an executive agency of the Department of Health (DH), operate in a political environment and suggest political change was linked to the uncertainty experienced by the PHE Marketing team. Three political changes were identified in the data as having an impact on PHE: (i) change in government; (ii) change in government policy; and (iii) change in government structure. These changes had an impact on the rationale behind why PHE create and maintain partnerships in their national social marketing campaigns. The change in government from a Labour Government to a Coalition Government and then to a Conservative Government brought in a period of austerity for all government departments including PHE. Budgets were cut and the PHE Marketing team had to take a different approach to their social marketing strategy, which included a greater focus on partnerships. There was also a change in government policy with a greater emphasis on devolution and this included encouraging partners to do more. Finally, the change in government structure brought great change to the Department of Health with the creation of Public Health England (PHE) in 2013 and the move of the DH Marketing team to PHE. These changes are demonstrated in the data as exemplified below.

- i. Political environment PHE operate in - *"We are a civil service and, you know, we are bound by the politics and that's ever-changing"* (PHE respondent C - Interview 14).
- ii. Alignment of policy and marketing - *"This is a very important point I haven't mentioned which is how important it is for partners that actually there is that alignment with the policy [of Government] and marketing goals [of PHE]"* (Partnerships agency respondent C - Interview 11).
- iii. Impact of policy of partnerships - *"Policy changes and shifts do dictate actually how hard or easy it is to engage [with partners]"* (PHE respondent E - Interview 16).
- iv. Policy of devolution - *"The Coalition Government has a clear intent to devolve responsibility to partners, both civic and commercial"* (DOC3 - Change4Life 3-year Marketing Strategy 2011-2014).
- v. Policy of partnership - *"In the past, our approach was "how can Government achieve this?" In the future, we will start from the presumption that others may be better placed to achieve our goals, often working in partnership with us"* (DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011).
- vi. Policy change to public health - *"From April 2013, responsibility for public health marketing will move to local authorities, as they take on responsibility for public*

health” (DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011).

6.6.4 First cycle code – economic climate

The findings highlight that a change in the economic climate in the UK had an impact on the PHE Marketing team, in particular through the introduction of austerity measures by the Coalition Government in 2010. All Government departments, including DH, had their budgets reduced and were instructed to identify savings each year. This resulted in the Marketing team having less budget year on year to develop their social marketing campaigns. Partnerships were identified as a way of delivering social marketing campaigns with a reduced budget. This impacted on the reason why partnerships were created and maintained as it changed from being to access the partners’ channels to about effecting behaviour change through partnerships.

“This strategy responds to the changing political and economic climate to propose a new approach to how marketing will be used to influence health related behaviour” (DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011).

“I think there were some very, very deliberate decisions we made that were a result of budget challenges back in 2010/2011 when clearly, you know, when we went from £X [amount stated] million worth of public health marketing budgets down to sort of £X [amount stated showing lower figure] million, which is where we are now, it requires you to think creatively about how you delivered things... I think increasingly the model that we’ve been looking at, which is a much newer approach, is that because we have got a limited budget for our campaigns but actually lots of partners are out there all of the time, talking to people about their health or about how they’re eating, that increasingly we’re looking to a more agile model of partnerships” (PHE respondent E - Interview 16).

“The economic climate means that we need to lean more on corporates to promote a pro-social message” (Partnerships agency respondent D - Interview 5).

6.6.5 First cycle code – social change

PHE develop national social marketing campaigns to try and change identified behaviours of people in England to improve their health. As such social change had an impact on the PHE Marketing team and the rationale behind why they create and maintain partnerships. The findings demonstrate that PHE were impacted by social change in two ways – (i) the

changing needs of their target audiences; and (ii) changes in the evidence for what works with regards to social marketing. This is evidenced in the following quotations.

“The Coalition Government has committed to continuing Change4Life. However, the programme will change in response to the changing needs of its target audiences and to the emerging evidence base” (DOC3 - Change4Life 3-year Marketing Strategy 2011-2014).

“Research found considerable change among the target audiences, driven in part by programmes such as Change4Life, but also by the changing social and economic landscape. This strategy responds to the findings of that research. (DOC3 - Change4Life 3-year Marketing Strategy 2011-2014).

Initially, PHE (or DH as it was) adopted a social problem approach to social marketing and created campaigns to tackle specific issues, e.g. obesity or smoking. The findings highlight that PHE’s strategy had changed and was now to take a life course approach looking more strategically at the target audience at different stages of their lives. This required a change to the approach to partnerships and a move away from short-term partnerships focused on single issues to long-term partnerships that could affect behaviour change through people’s lives. This is exemplified in the following quotations.

“The profound changes to the public health system necessitate a new approach to national health marketing that builds on previous successes” (DOC3 - Change4Life 3-year Marketing Strategy 2011-2014).

“Take a life-course and place-based approach – reaching people both directly and indirectly in schools, via commercial brands, employers, through health and social services, and in their local communities” (DOC3 - Change4Life 3-year Marketing Strategy 2011-2014).

Another social change demonstrated in the findings was a change in reason why commercial organisations wanted to work in partnership with PHE. There was a recognition that commercial organisations initially supported PHE as a way to show their corporate social responsibility credentials. However, it was noted that commercial partners were becoming more sophisticated and recognised that in the future their customers would be purchasing from more “purpose-led” businesses that adopted a more sustainable approach. By engaging with issues that were important to their customers and working with organisations like PHE commercial organisations could get more engagement with consumers. This is evidenced in the following quotations.

“When I started working in this area [partnerships] it was really commercial organisations doing it as corporate social responsibility. I think particularly with the increase of social media and I think with the millennials in particular, who are much

more demanding of their, I guess, the brands that they engage with and the workplaces that they engage with. So, they're much more about purpose-led organisations...they're really looking to partner with people that they can create change with over the longer period. And I think we've seen some of that opportunity at PHE" (PHE respondent A - Interview 1).

"Our partners are more sophisticated" (PHE respondent D - Interview 15).

6.6.6 First cycle code – technological developments

The findings highlight that changes in technology, particularly in digital and social media, had an impact on PHE's approach to their social marketing campaigns. PHE recognise the opportunity that technology provides for behaviour change, particularly as sections of their target audience are active users of social media, and they are now looking to create strategic partnerships with owners of digital platforms who can affect behaviour change. PHE understand that some of their target audience are spending long periods of time online and that the digital space is their preferred area for engagement. This provides an opportunity to engage people through digital platforms and social media and to use technology such as apps to support behaviour change. The findings show that the developments in technology could impact on the partnerships themselves and that the model for digital partnerships might be different to the current partnerships model. How PHE were going to create partnerships in the digital space was unclear but it was recognised that this would require a change in approach and a change in the types of partners they worked with. The evidence for this is supported in the following quotations.

"Continue to strengthen our relationships with the technology sector to encourage them to deliver evidence-based digital health tools to engage people on scale in their health" (DOC8 - PHE Social Marketing Strategy 2017 to 2020).

"I think one of the biggest shifts I've seen is the move to digital, which impacts social marketing, marketing generally as an industry. From a Public Health England perspective that customer journey has changed across a number of our campaigns. Which has meant that the way in which we work with our partners has needed to evolve over time" (Partnerships agency respondent D - Interview 19).

"I also think it'll become very much more about the kind of digital partnerships that are established, so maybe seeing those traditional partnerships evolve to be about how people interact with the digital world around them" (PHE respondent F - Interview 17).

"The tech sector's changing so rapidly, not sure whether the traditional partnership model really fits this and it's understanding, therefore, how we activate something

meaningful with the tech sector that can affect you know, some of the big public health agenda items” (PHE respondent E - Interview 16).

6.6.7 First cycle code - resistance to partners

The literature review identified resistance to partnerships with commercial organisations from both social marketing academics (Hastings, 2016) and public health practitioners (Thomas, 2008). The findings in this study highlight that PHE also experienced resistance to partnerships with the commercial sector but that this resistance had reduced as the environment in which PHE operated in changed. When Change4Life was launched in 2009 there was resistance from people in the public health community, as well as the wider general public, to the idea of PHE (or DH as it was then) working in partnership with commercial organisations on a national public health campaign. However, this resistance appears to have lessened over time as the rationale for doing this is better understood and accepted. This is exemplified in the following quotations.

“Against quite a lot of resistance actually. I think what was traditionally viewed as the enemy, like, you need to have them in the tent. And I think they did that even in the face of some quite significant resistance. Because I think there was a lot of resistance, particularly from health professionals, around how, you know, that it wasn’t feasible to work with someone like [commercial brand name]...there’s been quite a significant shift around partnerships...it’s become much more acceptable and understood why an organisation like PHE would work with, what has traditionally been seen as, like, the bad, the bad commercial brands. Or just bad commercial world” (PHE respondent A - Interview 1).

“I presented to all the GPs in [location stated] yesterday. And they said to me, oh, the real problem is Councils need to stop them building [commercial fast food brand] everywhere and fast food chains. And, you know, my response to them was actually you need to understand how people live their lives. And you can’t change it like that...this is how people live their lives. These are places they go to that we want to reach. So, I think it’s brilliant that you can reach into those companies, so I think you, you understand the people, understand where they go. Actually, they’re the people you need to be on-board with” (Local authority respondent E Interview 20).

6.6.8 First cycle code - budget cuts

The findings highlight that a specific aspect of the political change and economic climate that impacted on PHE’s rationale for creating and maintaining partnerships was the

reduction in its budget for developing and implementing national social marketing campaigns. The rationale changed over time as budget cuts were introduced with the PHE Marketing team now looking to partnerships to extend their budget. Partnerships have provided an opportunity to do more with less and PHE now look for partners who will invest their own budget into co-creating activity to support the social marketing campaigns. This is exemplified in the following quotations.

“We have got a limited budget for our campaigns but actually lots of our partners are out there all of the time, talking to people about their health or about how we're eating, that increasingly we're looking to a more agile model of partnerships which is about us amplifying when the partner's doing something rather than the partner amplifying when we do something...it's really hard to pinpoint when it actually changed, isn't it, when you think about it. I guess we've just learnt as we've gone. I mean, I think there were some very, very deliberate decisions we made that were a result of budget challenges back in 2010/2011 when clearly, you know, we went from £X [amount stated] million worth of public health marketing budgets down to sort of £X [amount stated] million which is where we are now. But actually, you know, it requires you to think more creatively about how you delivered things” (PHE respondent E - Interview 16).

“The budgets over the last few years have been dwindling and yet we still have an enormous public health job to do...what partnerships allow us to do is broaden communications, target more people than the marketing budget would allow, broadens range and reach of a particular message” (Partnerships agency respondent A - Interview 2).

“I think partnerships are going to become more and more important to PHE and Department of Health. It's not just a function of increasing pressures on budgets but I think it's also a function of our audience” (Partnerships agency respondent C - Interview 11).

6.7 Chapter summary

This study identified that the reason why PHE create and maintain partnerships in their national social marketing campaigns has evolved and it is now to effect a change in behaviour in their target audiences. Partnerships has become a core component of PHE's social marketing strategy and this has led to a change in the way that partnerships are defined by the PHE Marketing team, a change in their typology of partnerships and a change in the selection criteria for prospective strategic partners. PHE now see partnerships as a concept that is core to their social marketing strategy. They look to

create strategic partnerships that can affect behaviour change and select potential strategic partners who provide the best opportunity to achieve this. The findings also demonstrate that PHE have been operating in a changing environment and the development of long-term strategic partnerships has mitigated some of the uncertainty they have experienced.

This provides a greater understanding of why PHE create and maintain partnerships as part of their national social marketing campaigns. The next chapter, Chapter 7, looks at how PHE create and maintain partnerships.

Chapter 7

Partnerships development process - how PHE create and maintain partnerships as part of their national social marketing campaigns

7.1 Introduction

The overarching objective of this study is to generate a greater understanding of the use of partnerships in national social marketing campaigns and this provides the focus for the first research question (RQ1). The fourth research question (RQ4) looks to understand how partnerships are created and maintained to support national social marketing campaigns. As explained in the Methodology chapter, thematic analysis was applied to the analysis of all data collected in this study (documents, observation, and interviews). In line with the Critical Realist commitment to abduction, the research of Agostini and Nosella (2017) provided the framework to guide the generation of four initial codes and the second of these codes is “partnerships development process”. Gaining knowledge of the process for the development of partnerships supports a greater understanding of how partnerships are created and maintained by PHE as part of their national social marketing campaigns (RQ4). In addition, the initial code of “Other” was created to capture data which did not fit within the Agostini and Nosella (2017) framework and associated codes of: Antecedents; Partnerships Development Process; and Outcomes. The findings from these data coded as 'Other' will also be presented and explained in this chapter as they were found to relate to how PHE create and maintain partnerships.

As explained in Chapter 5 above, a framework was developed in this study to provide a visual representation of the findings from the research and this is presented in Figure 33 below. The findings from the data allocated to the initial codes of “Partnerships Development Process” and “Other” were brought together under the heading of “Partnerships Development Process” in this framework, as highlighted in green in the centre of Figure 33.

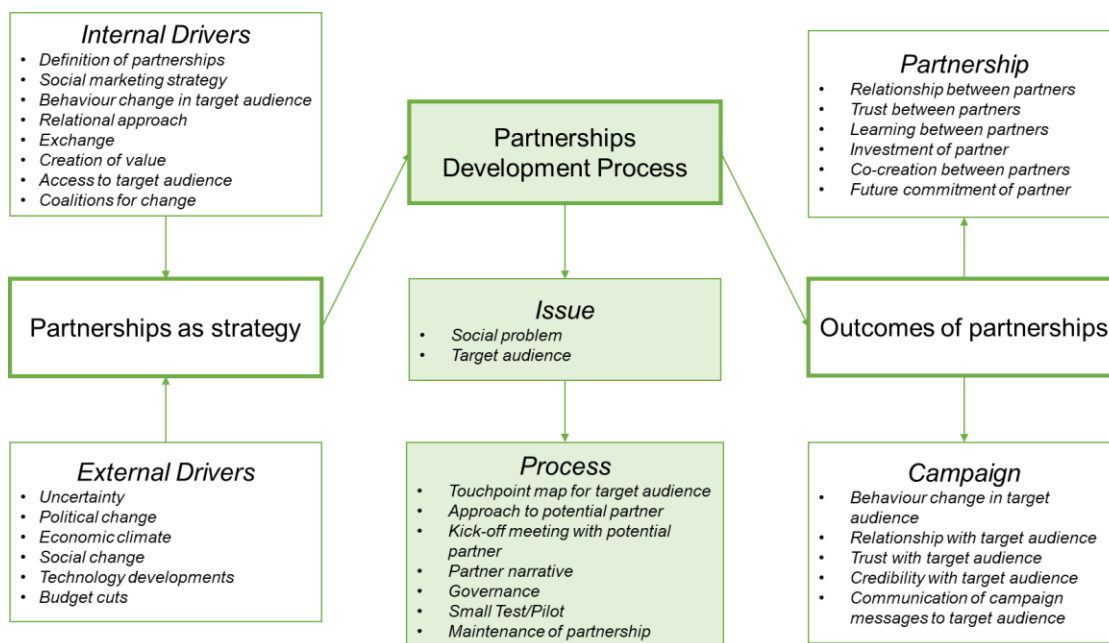


Figure 33: Framework highlighting the findings relating to “partnerships development process” in national social marketing campaigns

As noted in the previous chapter, the findings in this study highlight that the reason why PHE create and maintain partnerships has evolved and partnerships are now a core component of PHE’s social marketing strategy. This change has required the process for how PHE create and maintain partnerships to also evolve to focus on the development of strategic partnerships. PHE’s process for the creation and maintenance of strategic partnerships with commercial organisations consists of 7-stages as presented in Figure 34 below. The process is reduced to 5-stages when creating strategic partnerships with public sector organisations as PHE believe these carry less risk than those with commercial sector organisations and as such require a less formal approach with a lower level of governance. An explanation of how these findings emerged with evidence from the data is provided in Sections 7.2-7.4 of this chapter.

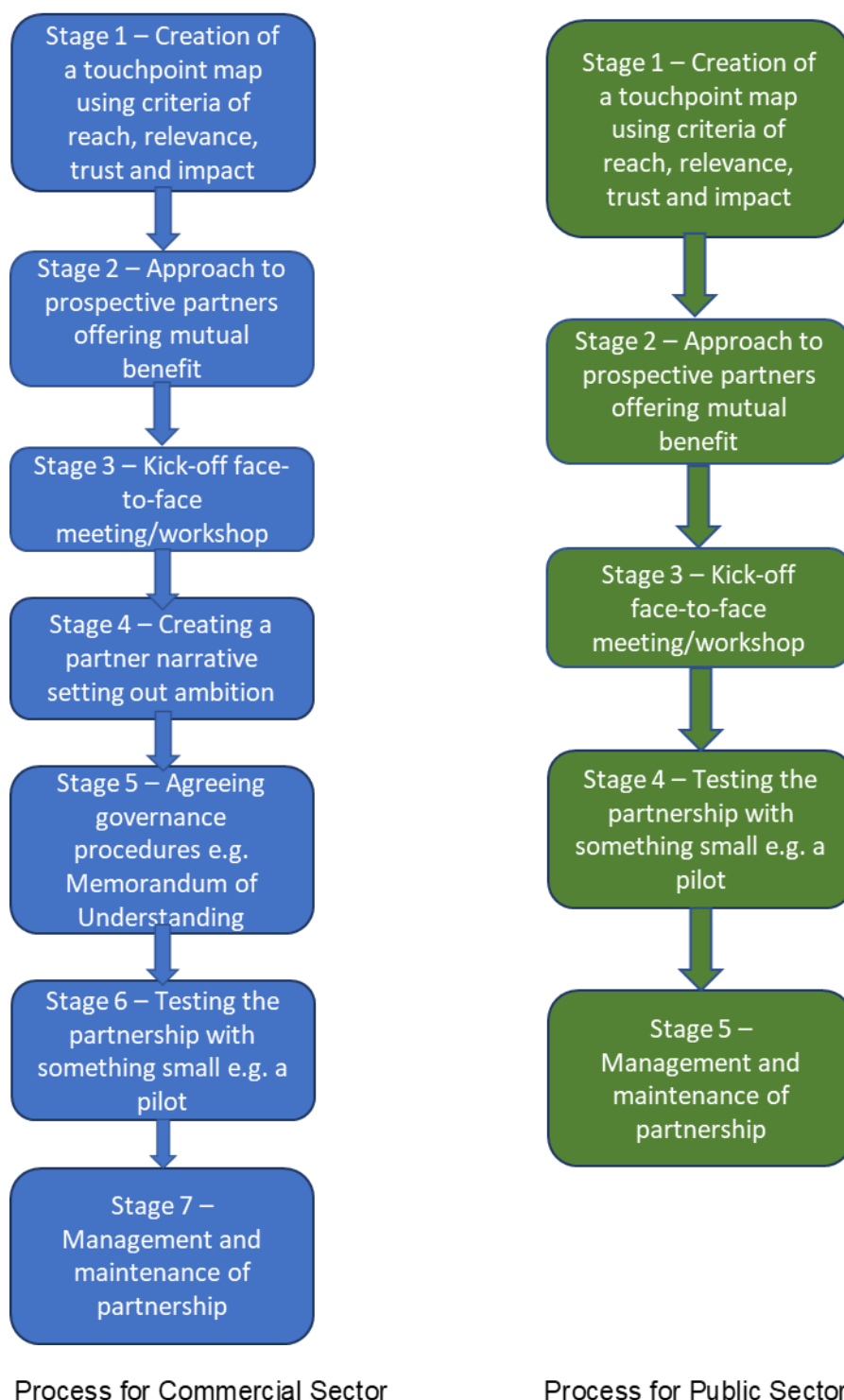


Figure 34: Process for the creation and maintenance of strategic partnerships by PHE

These findings are important as the literature review identified the need for a greater understanding of the “scope” of partnerships from a practical perspective and in particular, what makes for successful partnerships in social marketing (Duane and Domegan, 2019). PHE believe they have developed a process for creating and maintaining successful strategic partnerships, which can be used for partnerships with the commercial sector or with the public sector. This will be of value to practitioners of social marketing who are looking to create their own strategic partnerships.

The change to partnerships as strategy has also led to a change in the importance and structure of the team whose role it is to create and maintain the partnerships. The findings demonstrate that PHE's Partnerships team are now positioned on an equal level within the PHE Marketing team to the other two teams that make up the Marketing department – the Strategy & Planning team and the Campaigns team - showing the importance given to partnerships in PHE's approach to social marketing. This is evidenced by the change in organisational structure of the PHE Marketing team as shown in Figure 35 below, which demonstrates that after a restructure of the PHE Marketing team in 2012 a stand-alone Partnerships team was created led by the Deputy Director - Partnerships (highlighted in green) who reported directly to the Director of Marketing.

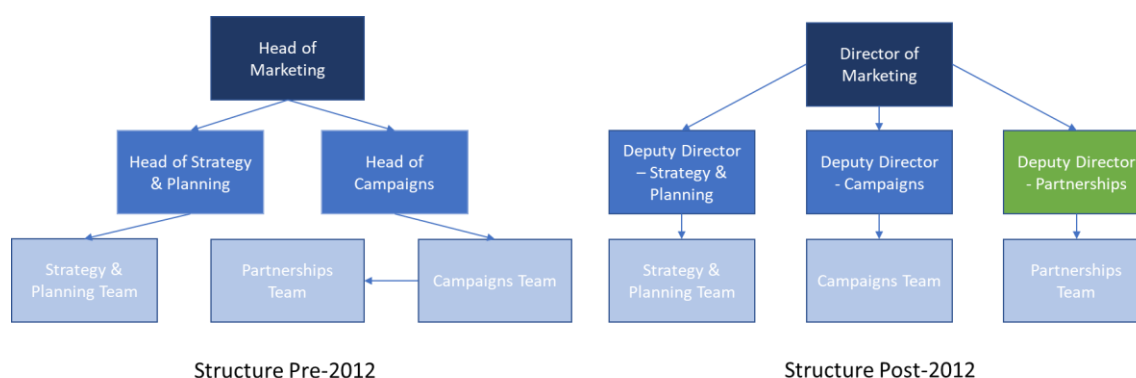


Figure 35: PHE Marketing team structure pre and post 2012

PHE see partnerships as an integral component of their social marketing strategy and as such give it the same level of importance as planning and campaign creation. This is a significant finding in terms of understanding the scope of partnerships in practice and what makes partnerships successful. In addition, PHE believe that their partnerships team require specific skills compared to the rest of the Marketing team. These additional skills include negotiation, listening, relationship management, collaborative working, public and private sector understanding, and selling. Again, this will be of value for social marketing practitioners looking to use partnerships in their programmes.

The findings from the “Other” data highlight that PHE’s change in approach to focus on the creation of strategic partnerships has made it necessary for PHE to build long-term relationships with these partners and the individuals they employ to manage the partnership. PHE see mutual benefit as a key requirement in the creation and maintenance of long-term partnerships and this requires the partnerships team to develop an understanding of each partner and their organisational and individual needs.

The analysis of all data in this study attributed to the initial code of “partnerships development process” produced 11 first cycle codes and the data related to these were further analysed and reviewed to develop 4 second cycle codes, from which 4 themes emerged with regards to the partnerships development process in social marketing. In

addition, the analysis of all data attributed to the initial code of “Other” produced 1 first cycle code and the data related to this were further analysed and reviewed to develop 1 second cycle code, from which 1 theme was developed. A thematic map is used to visualise the relationships between each theme, and this is shown in Figure 36 below. A detailed explanation of each of these 5 themes is provided in sections 7.2 to 7.6 of this chapter with the links between these findings and the extant theory identified in the literature review being explored. Within these sections the evidence from the data that support the development of the first and second cycle codes is also provided. The complete data tables are included in Appendix E.

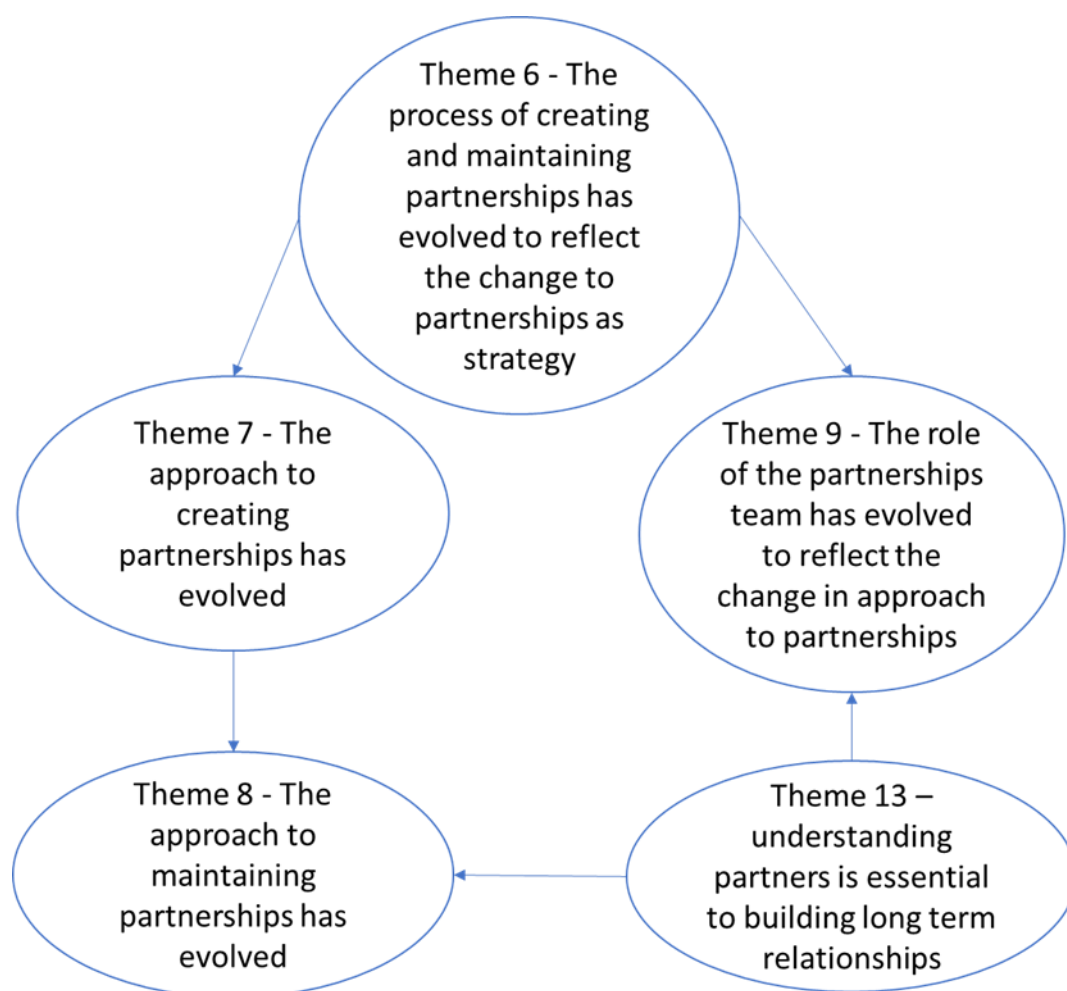


Figure 36: Thematic map generated from the data attributed to the initial codes of partnerships development process and other

7.2 Theme 6 – The process of creating and maintaining partnerships has evolved to reflect the change to partnerships as strategy

As noted in the previous chapter, Theme 1 highlighted that partnerships is a core component of PHE’s social marketing strategy. Theme 6 is linked to this as it acknowledges that the process of creating and maintaining partnerships at PHE has

evolved to reflect the change to partnerships as strategy. Figure 37 below illustrates, in the form of a thematic map, how Theme 6 was developed from the first and second cycle codes. Figure 37 shows that the analysis of data identified 3 first cycle codes – “Approach to partnerships”; “Partnerships learnings”; and “Partnerships model”. As explained in the methodology chapter, these 3 first cycle codes were brought together to form the second cycle code of “Evolution of partnerships strategy”, and this was used to generate Theme 6 - “The process of creating and maintaining partnerships has evolved to reflect the change to partnerships as strategy”.

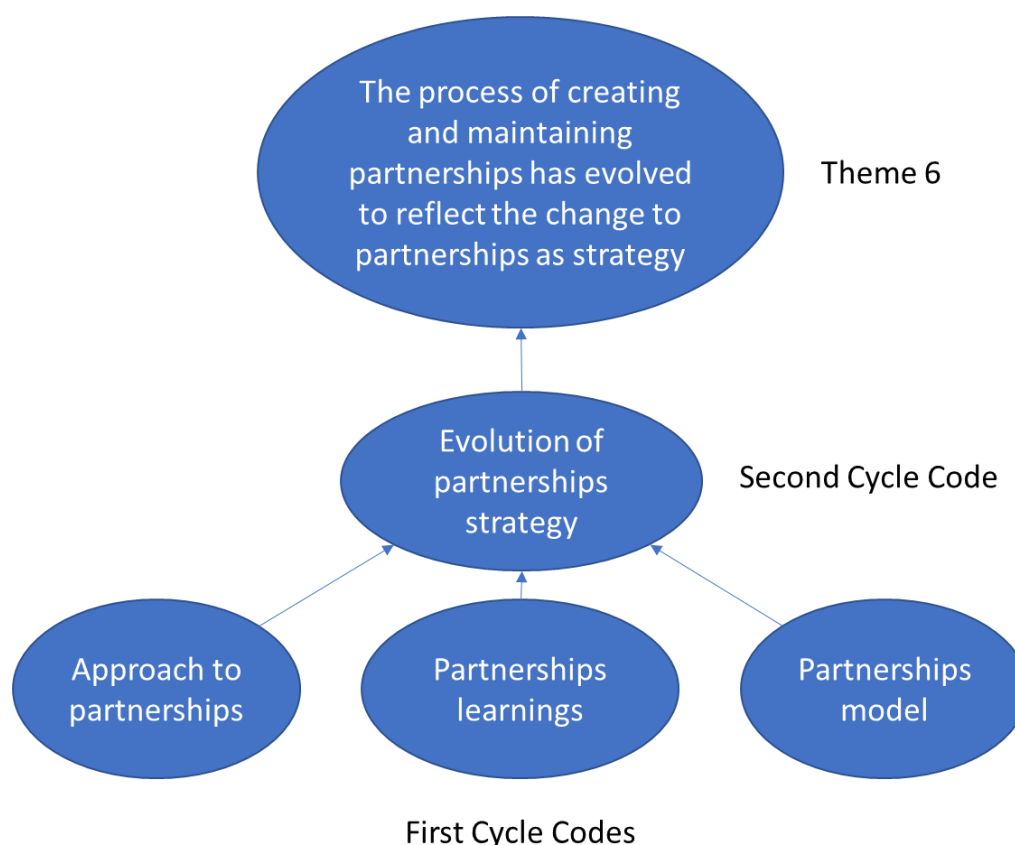


Figure 37: Thematic map – Generation of Theme 6

The fourth research question in this study (RQ4) asks - how are partnerships created and maintained to support national social marketing campaigns? The documentation, observation and interview data suggest PHE have evolved their process for creating signposting partnerships to reflect the change to partnerships as strategy. The PHE Marketing team now have a process for the creation and maintenance of strategic partnerships. PHE view partnerships as a strategic part of their approach to social marketing and see strategic partners as providing the opportunity to effect a change in behaviour in their target audiences. To enable this PHE have changed their partnerships strategy to support the objectives of the overall social marketing strategy. PHE’s partnerships strategy has changed to focus on creating and maintaining strategic partnerships with organisations that can best affect behaviour change. The partnerships

strategy has been informed by learnings and understanding of partnerships developed by PHE since 2009. PHE's model for partnerships now focuses on the creation of a small number of long-term strategic partnerships supported by a larger number of signposting partnerships, as highlighted in section 6.4 of the previous chapter. PHE's approach appears to be different from that identified in the social marketing literature where partnerships were seen as being one part of the overall social marketing mix and, as such, a marketing tactic. The literature proposes partnerships are created and maintained after the social marketing intervention had been developed but PHE take a much more strategic approach to partnerships and have a specific partnerships strategy that is a core component of their overall social marketing strategy. This means strategic partnerships feature at a much earlier stage in the development of the social marketing intervention at PHE than is proposed in the social marketing literature.

7.2.1 Second cycle code – Evolution of partnerships strategy

Theme 6 – “the process of creating and maintaining partnerships has evolved to reflect the change to partnerships as strategy” – is developed from the second cycle code – “evolution of partnerships strategy”. This second cycle code is a pattern code generated from a bringing together of 3 first cycle codes – “approach to partnerships”; “partnerships learnings”; and “partnerships model” - that were developed from the data ascribed to the initial code of Partnerships Development Process. Examples from the data that make up each of these 3 first cycles codes are presented in sections 7.2.2 to 7.2.4 below and the full data set can be found in Appendix E.

In brief, the data suggest the *approach to partnerships* has changed over time, in part, as a result of *partnerships learnings* and this is reflected in a change in the *partnerships model* developed by PHE. As noted in the previous chapter, PHE now see partnerships as a component of social marketing strategy and this has led to an *evolution of partnerships strategy* where *the process of creating and maintaining partnerships has evolved to reflect the change to partnerships as strategy*.

7.2.2 First cycle code – Approach to partnerships

As noted above, the fourth research question (RQ4) in this study is focused on generating a greater understanding of how PHE create and maintain partnerships as part of their national social marketing campaigns. Data relating to this issue were identified in the review of documents and during the observation. In addition, it was the third question asked to participants in the face-to-face interviews. All three data sets suggest the approach PHE take to creating and maintaining partnerships has evolved over time.

In 2009, PHE's rationale was to create partnerships to gain access to partners' channels and this was reflected in their partnerships approach. Partnerships were created after the campaigns had been developed and were viewed as one of the promotional elements of the social marketing campaigns to support the campaign spikes. The partnerships approach was to create as many partnerships as possible to give the campaigns greater scale and reach. However, by 2013 there had been a change in PHE's partnerships approach, in line with the change in rationale behind why PHE create partnerships. PHE are now creating and maintaining partnerships to effect behaviour change and partnerships have become a core component of PHE's social marketing strategy. Rather than partnerships being created after the campaigns are developed, PHE now consult with partners on the development of their social marketing strategy and are co-creating campaigns with partners. This change has resulted in PHE needing to create strategic partnerships that are more long-term and require maintenance by the partnerships team. PHE's approach to partnerships has further evolved to working with partners who are already engaging with the target audience rather than looking for partners to support PHE campaigns. This change is to enable the creation of strategic partnerships that can support PHE's strategy of always-on campaigns. This evolution of PHE's approach to partnerships over time is evidenced in the following progression of quotations from the documentation data.

- i. Initial strategy of campaign spikes that partners support - *"Strategy to have campaign spikes each year, one in January and one in July, and for partners to support these spikes"* (DOC1 - Change4Life Marketing Strategy 2009).
- ii. Change to developing strategy with partners - *"Marketing strategy was developed in consultation with key partners...co-creation with partners particularly by working with content brands such who resonate with the target audiences...strategy shift towards a more year-round content-driven marketing approach with support of partners"* (DOC6 - PHE Marketing Strategy 2014-17).
- iii. Change to maintaining strategic partnerships - *"Requires the maintenance of strategic partnerships"* (DOC7 - PHE Marketing Strategy 2014-17 one year on).
- iv. Working with partners to effect behaviour change - *"Work with partners who are already engaging with our audiences to mould programmes around the rhythm of their lives rather than seeking to persuade people to change their behaviour at points that fit in with campaigns"* (DOC8 - PHE Social Marketing Strategy 2017 to 2020).

This change in PHE's approach to partnerships is also demonstrated in the observation and interview data. Partners are now recognised to provide an opportunity to effect behaviour change rather than simply a channel for amplifying campaign messages. As

such the approach to partnerships has changed and PHE now work with partners to develop campaigns some of which are “partner-driven”. Partnerships are being created and maintained before the campaigns are developed so that partners are able to provide input from the beginning. The approach to partnerships has become more strategic to reflect that partnerships are a core component of the overall social marketing strategy at PHE. This change in PHE ‘s approach to partnerships has required the PHE Marketing team to plan much further ahead so that they can engage with partners earlier in the process. These changes are exemplified in the following quotations.

“Partners having a genuine capacity to affect and support behavioural change...partners being better placed than PHE to motivate behaviour change”
(Observation notes).

“Actually the partnership is really the key driver for the whole thing. So, it’s a partner-driven campaign, as opposed to here’s a campaign that’s got partnership support” (PHE respondent G - Interview 18).

PHE’s approach to partnerships has evolved to be more strategic with the campaigns becoming partner-led as opposed to the partnerships being campaign-led.

7.2.3 First cycle code - Partnerships learnings

The literature review identified a gap in social marketing knowledge with respect to understanding how successful partnerships are created, which the fourth research question (RQ4) set out to address. The findings highlight that PHE, and DH before them, have been creating partnerships to support their social marketing campaigns since 2009 and have developed learnings with regards to creating and maintaining successful partnerships. This is evidenced in the following quotation:

“We’ve evolved and learnt and grown and we understand the commercial sector much better, so I think all of those things have, I guess, driven us to think more creatively about how we do it. So, I don’t think there was ever a fixed point where we’d turn around and say like today we’re going to do it like this. I think it’s been a process of evolution, understanding and getting to understand our partners better and knowing what works” (PHE respondent E - Interview 16).

The data show five key learnings, which are listed below with evidence in the form of quotations:

- i. Starting off by looking to create something together rather than looking for partners to support the campaign - *“What we talked about was how can we work with partners to develop a campaign...match the partners from the beginning and then*

develop the campaign around the coalition of partners” (PHE respondent F - Interview 17).

- ii. Accepting that each partner may want to take a different approach to a campaign that is more representative of their brand – *“If you’ve got one core ambition...every single partner is going to want to execute that in a slightly different way that is relevant to how they deliver their own corporate message, or what they might be doing in their own environments at that time, and I think that is probably the biggest learning”* (PHE respondent E - Interview 16).
- iii. Spending time understanding the business and needs of each partner and listening to what they have to say - *“I think there’s understanding or there’s spending enough time understanding what they [the partner] want to get out of it and understanding their business, rather than it always being an ask. So, you need to create something which is mutually beneficial”* (Partnerships agency respondent B - Interview 5).
- iv. Involving the partners in the development of products and tools (i.e. consumer engagement resources such as personalised action plans and apps) at the start to ensure they work for the partner - *“I think one of the key learnings out of that was you really have to involve the partner organisations in the development of the tools and the assets and the resources and the strategies and you genuinely have to co-create to be successful. It’s like anything else; it’s about relationships. It’s about listening, it’s about collaborating”* (Partnerships agency respondent C - Interview 11).
- v. Recognising that there are different roles for different partners - *“recognising there is different roles for partners and they are all valid”* (Partnerships agency respondent D - Interview 19).

This final point links to the different types of partnerships PHE have – strategic and signposting. The findings suggest that these learnings had led to a change in PHE’s partnerships approach and have informed the evolution of their model for the creation and maintenance of strategic partnerships.

7.2.4 First cycle code - Partnerships model

The change to partnerships becoming a core component of PHE’s social marketing strategy has required the development of a different model for how the PHE Marketing team create partnerships as presented in section 7.1 above. The specific detail of this new model will be explained in section 7.3 of this chapter. The initial partnerships model, developed for the Change4Life campaign in 2009, involved the creation of as many partnerships as possible to support the campaign. These partnerships were seen as

“signposting” partnerships and the partners’ channels were used to push out campaign messages and resources to the target audience. PHE now create and maintain partnerships to effect a change of behaviour in their target audiences and their partnerships model has changed to partnering with a smaller number of select organisations who have potential to effect behaviour change. These are seen as “strategic” partnerships and require a longer-term approach to support the building and maintenance of relationships with selected partners. The evidence from the data that supports this change is provided in the following quotation.

“It’s changed quite a bit over the years, so back in the early days it was more about trying to access channels that you could apply a defined message...now, sort of, fast-forward ten years, it’s much more about leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and credibility that they can provide, to interpret a behaviour change message in their own words through points in time that are highly relevant to getting people to take action” (Partnerships agency respondent B - Interview 5).

PHE’s process for creating and maintaining partnerships has evolved over time to reflect the change to partnerships as strategy. Section 7.3 below presents and explains the new model in detail.

7.3 Theme 7 – The approach to creating partnerships has evolved

As noted above, the fourth research question (RQ4) in this study is focused on generating a greater understanding of how PHE create and maintain partnerships as part of their national social marketing campaigns. Theme 6 - “The process of creating and maintaining partnerships has evolved to reflect the change to partnerships as strategy” – informed the development of Theme 7 - “The approach to creating partnerships has evolved”. Figure 38 below illustrates how Theme 7 was developed from a second cycle code in the form of a thematic map. Figure 38 shows that the analysis of data generated 1 second cycle code – “Change in approach to creating partnerships” - which was developed from 2 first cycle codes – “Approach to prospective partners”; and “Creation of partnerships” - and this was used to develop Theme 7 - “The approach to creating partnerships has evolved”.

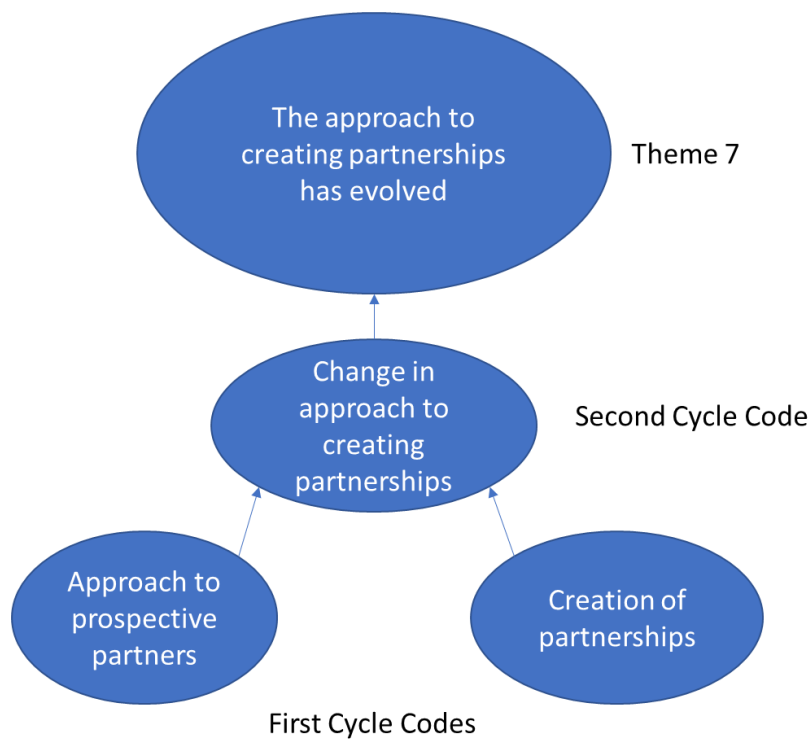


Figure 38: Thematic map – Generation of Theme 7

This study identified a gap in the social marketing literature with respect to how partnerships were created in social marketing campaigns and this research aimed to generate a greater understanding of this area. The findings demonstrate that the approach to creating partnerships at PHE has changed to reflect the change in approach to partnerships, the learnings developed and the evolved partnerships model as noted in sections 7.2.2, 7.2.3 and 7.2.4 above. PHE now focus on the creation and maintenance of strategic partnerships and have developed a 7-stage process to support this. The 7-stage process is used when creating strategic partnerships with commercial organisations and it is reduced down to a 5-stage approach to strategic partnerships with public sector organisations as these are seen by PHE as having less risk and so require lower governance. This process is presented in Figure 39 below. It is important to note that the PHE Marketing team still create signposting partnerships and use a process for this that consists of Stages 1, 2 and 5 of the model below, although the maintenance of these partnerships is very light touch.

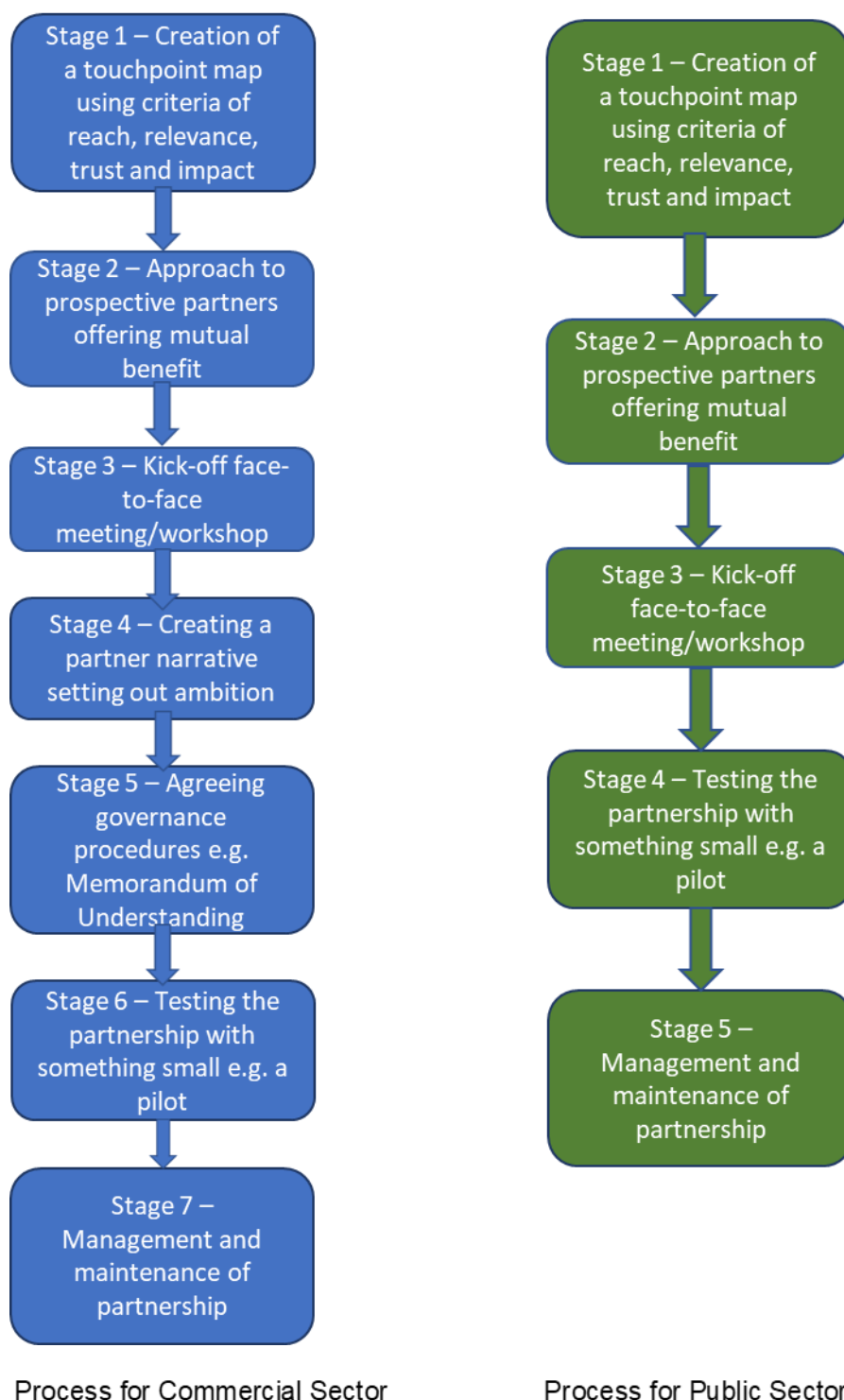


Figure 39: PHE's process for the creation and maintenance of strategic partnerships

The findings from the observation and interview data highlight that once the PHE Marketing team have gained an understanding of both the social problem they are looking to tackle and the target audience, they then begin the process of creating partnerships by developing a “touchpoint” map for the target audience. This involves gaining an understanding of all aspects of the lives of the target audience and identifying the organisations/brands/people who the target audience come into contact with on a regular basis and who have the opportunity to effect a change in behaviour. Once the touchpoint

mapping has been completed, it is the responsibility of the Partnerships team to develop a shortlist of prospective strategic and signposting partners and then to make an initial approach to these prospective partners. This initial approach usually takes the form of a face-to-face workshop session with prospective strategic partners and a telephone conversation with prospective signposting partners. No matter the partner role, the Partnerships team look to identify where the potential for mutual benefit is for both the prospective partner and PHE prior to making an initial approach. For a partner this might be legitimacy gained from working with an executive government agency, being associated with a positive campaign, generating an increase in footfall to a website or physical store, or even getting an increase in sales of a particular item.

The findings also emphasise that risk was a key consideration for PHE when creating partnerships, particularly strategic partnerships with commercial organisations. As an executive government agency that was only formed in 2013 PHE are concerned about their reputation with the national government, the Department of Health, the wider public health community, and the general public. The Partnerships team need to assess the risk presented by each partner or potential partner in relation to them doing something that could damage PHE's reputation and bring criticism to the organisation. They also need to consider the risk of a partnership not working or a partner not delivering what has been agreed and the impact this could have on the campaign and PHE. Any risk to the partner also needs consideration, for example a delay to a campaign that has a negative impact on a partner either financially or reputationally.

The issue of risk was deemed to be greater when creating partnerships with commercial organisations than with public sector organisations. There also appeared to be more perceived risk when creating strategic partnerships than when creating signposting partnerships and this has led to a change in the process of how PHE create partnerships with both the private and public sector. The observation and interview data evidence that PHE have developed a 7-stage approach for creating strategic partnerships with commercial organisations (see Figure 39 above), which is reduced to 5 stages when creating strategic partnerships with public sector organisations as these are seen to involve less risk to PHE.

The approach with commercial sector organisations is more formal with the inclusion of governance procedures and a partner narrative, which is not seen to be required with the public sector. An explanation of each stage as identified in the data is provided below and the evidence from the data to support this is presented in sections 7.3.2 and 7.3.3.

Stage 1 – creation of a touchpoint map - PHE develop a list of prospective partners by creating “touchpoint” maps for their target audiences. This involves gaining an understanding of all aspects of the lives of the target audience and

identifying the organisations/brands/people who the target audience come into contact with on a regular basis and who have the opportunity to effect a change in behaviour. This point of contact could be with a retailer when they are making a purchase, a brand that they follow on social media, or a pharmacist who they speak to in a chemist's. The touchpoint map is used to develop a long list of prospective partners and then this list is analysed using PHE's selection criteria to produce a "shortlist" of prospective partners. These selection criteria were identified in section 6.5 of the previous chapter and consists of – (i) reach to the target audience, (ii) relevance to the target audience, (iii) trust by the target audience, and (iv) impact on the target audience. The prospective partners are also assessed in terms of risk. Using these criteria PHE identify a shortlist of prospective strategic partners who have the best prospect to effect behaviour change.

Stage 2 – approach to prospective partner – following the creation of a shortlist of prospective partners the PHE partnerships team then make an initial approach to each prospective partner. This initial approach would usually take the form of a face-to-face workshop session with prospective strategic partners as opposed to simply a telephone conversation with prospective signposting partners. No matter the partner role, PHE look to identify where the potential for mutual benefit is for of any prospective partnership prior to making an initial approach. For a partner this benefit might come from working with an executive government agency, being associated with a positive campaign, an increase in footfall to a website or physical store, or even an increase in sales of a particular item.

Stage 3 – "kick-off" meeting/workshop – as noted above the PHE partnerships team aim to organise an introductory meeting with representatives from a prospective strategic partner. This meeting takes the form of a workshop and is seen as an important opportunity to get to know the prospective partner and understand their aims and goals. By doing this PHE can better identify where there could be an alignment of aims and an opportunity for mutual benefit.

Stage 4 – creating a partner narrative - following the successful completion of a kick-off meeting the next stage is to develop what the partnerships team refer to as a joint partnerships narrative between the partner and PHE. This stage is only carried out when developing strategic partnerships with commercial organisations as they are seen by PHE to have more risk and so require a clear narrative. This is a written document that sets out the ambition for the strategic partnership by bringing together the aims of the campaign and the role of the specific partner within this and using the partners own tone of voice in the narrative.

Stage 5 – agreeing governance procedures – agreeing the technical management of a strategic partnership in the form of governance procedures is seen by the partnerships team as a key stage in the creation and maintenance process to help protect both PHE and the partner. This stage is only carried out with commercial organisations as it is felt that partnerships with public sector organisations offer less risk to PHE. The governance procedures set out the principles that each partner will work to so that each party is clear what is expected of each other. Importantly, it sets out what will happen if things go wrong. The governance can be a formal legal document or a less formal Memorandum of Understanding (MOU) and the level of governance required is linked to the level of risk of the partnership. However, there does need to be a level of flexibility to allow the partner to be creative and relevant to the target audience.

Stage 6 – testing the strategic partnership with something small – the next stage in the partnership creation and maintenance process is for PHE to work with the partner on something small to test the partnership. This helps to reduce the risk of a partnership by testing the commitment of each party, developing relationships between the two organisations, and seeing how the different organisational cultures work together. Also, the social issues PHE are trying to tackle are complex and this can present a barrier to getting a partnership off the ground. So the partnership starts with something small and achievable, such as a pilot, that provides more chance for success, which can then be built upon.

Stage 7 – management and maintenance of strategic partnerships - the change in partnerships strategy to developing long-term strategic partnerships led to a change in the management of partnerships by PHE. The findings show the partnerships team are now focusing on maintaining long-term partnerships and this is presented and explained under Theme 8 – “The process of maintaining partnerships has evolved” - in section 7.4 below. The data demonstrate that PHE’s process for creating and maintaining partnerships with commercial organisations has evolved over time as a result of a “test and learn” approach and an important part of this process is the management of communication between PHE and its partners, particularly as the environment in which PHE operate in has been uncertain.

As can be seen in Figure 39 above, PHE take a 5-stage approach to creating strategic partnerships with public sector organisations such as local authorities, which is less formal than with commercial organisations as the level of risk is believed to be lower. There is a lesser level of governance with no legal agreement or Memorandum of Understanding and no joint partner narrative.

7.3.1 Second cycle code – Change in approach to creating partnerships

Theme 7 – “The approach to creating partnerships has evolved” – is developed from the second cycle code – “Change in approach to creating partnerships”. This second cycle code is a pattern code generated from a bringing together of 2 first cycle codes – “Approach to prospective partners”; and “Creation of partnerships” - that were developed from the data ascribed to the initial code of Partnerships Development Process. Examples from the data that make up each of these 2 first cycles codes are presented in sections 7.3.2 to 7.3.3 below and the full data set can be found in Appendix E.

In brief, PHE have developed an *approach to prospective partners* as part of the approach to the *creation of partnerships*. This approach can be modified depending if the partner is from the commercial sector or the public sector. PHE have developed a step-by-step *approach to creating partnerships* that has changed over time in response to the change to partnerships as a component of PHE’s social marketing strategy and this means *the approach to creating partnerships has evolved*.

7.3.2 First cycle code - Approach to prospective partners

As noted above, the observation and interview data suggest PHE develop a shortlist of prospective partners by creating a “touchpoint” map for the target audience. Each prospective partner on the shortlist is then assessed in terms of risk. Then an initial approach is made to those prospective partners who are deemed to present an acceptable level of risk. The initial approach is usually a face-to-face meeting/workshop with prospective strategic partners and a telephone conversation with prospective signposting partners. This is exemplified in the following quotations from the interviews.

- i. Touchpoint map - *“There is a step-by-step process. The first thing that we do is a touchpoint map. So, for example, you identify the target audience and you actually do a touchpoint map that identifies...throughout their day, what are the various opportunities they have to engage... you start to identify what organisations they engage with at each of the touchpoints”* (Partnerships agency respondent D - Interview 19).
- ii. Reducing the number of prospective partners - *“When you do that partner mapping, you could end up with thousands of touchpoints, obviously, and then it's a process of refining and refining and refining that list so that your listed partners you're seeking are the ones that potentially could have the most impact”* (PHE respondent C - Interview 16).

- iii. Risk mitigation - *"We often, through that identification of partners, look to mitigate some of those risks as part of that mapping piece"* (Partnerships agency respondent D - Interview 19).
- iv. Initial approach - *"When the partner-mapping piece is done, the shortlist identified, we would then look to meet with all those partners...you actually start with a workshop session"* (Partnerships agency respondent D - Interview 19).
- v. Listen to the partner - *"Let the partner speak first. You know, because that's the key. You really need to understand their aims, their goals. Your aims and your goals look for where the overlap is. You know, that's the sweet spot. That's where you'll get the maximum value from the partnership"* (Partnerships agency respondent C - Interview 11).

7.3.3 First cycle code – Creation of partnerships

The findings highlight that PHE have a different process for the creation of strategic partnerships with commercial organisations than with public sector organisations. For the former it is a quite formal process whereas with the latter it is less formal. The observation and interview data suggest PHE have created a 7 stage process for creating and maintaining strategic partnerships with commercial organisations. This process can take a long time but PHE believe it is worth investing this time for a strategic partnership that has potential to effect behaviour change. This is evidenced in the following quotation:

"From scratch, I guess it's a long process. You know, it takes months, to be honest. So, if it's a completely new relationship and it's something that you decide is a strategic relationship, that can take up to a year, if not longer, to develop, depending on what the situation is" (PHE respondent F - Interview 17).

As noted in 7.3.2 above, the process consists of the creation of a touchpoint map, then making an approach to a prospective partner and having a kick-off meeting. The next stages in the process are: developing a partner narrative, agreeing the governance procedures, testing the partnership on something small, and managing the partnership. This approach is evidenced in the following quotations.

- i. Partnership narrative - *"We found over time that it's quite useful to almost build a joint partnership narrative that really looks to look at both tones of voices of the two. Both that partner organisation and indeed the campaign narrative and how the two come together...so, it really looks like it's a coherent and integrated piece"* (Partnerships agency respondent D - Interview 19).
- ii. Governance - *"Make sure that your governance is set up right. And governance comes in lots of different ways. But I think the formal agreement piece, whether it's*

legal or MOU [memorandum of understanding] that sets out how, you know, what happens in the case of anything going wrong” (PHE respondent A - Interview 1).

- iii. Starting with something small - *“The process of partnerships often...starts with something quite small to, kind of, test out each other's commitment to the partnership and how things might work. Because if you start from a very global macro perspective of this is what we will achieve together, sometimes it's very difficult to actually get that moving. So, you'll start off with something quite small and gradually build” (PHE respondent C - Interview 14).*
- iv. Maintenance - *“It depends on the kind of level of partnership that we have, so, if it's, you know, kind of a key partner, a key strategic partner, it's regular face-to-face meetings. We feel as if we've got a lot more out of the regular face-to-face meetings. However, we can't do that with all the partner relationships that we have. So, you rely on email quite a lot, and kind of communicating in that way” (Partnerships agency respondent A - Interview 2).*

The data also suggest PHE reduce this 7-stage process to a 5-stage one for the creation of strategic partnerships with public sector organisations, which differs from the process for commercial organisations as it does not include the governance procedures or partner narrative. This is because strategic partnerships with the public sector are deemed to be of less risk to PHE than those with the private sector. These points are evidenced in the following quotation.

“It's much looser in local government. There's no MOU in terms of exchange of resources or budget” (PHE respondent B - Interview 3).

7.4 Theme 8 – The approach to maintaining partnerships has evolved

As noted above, the fourth research question (RQ4) in this study is focused on generating a greater understanding of how PHE create and maintain partnerships as part of their national social marketing campaigns. Themes 6 and 7 informed the development of Theme 8 - “The approach to maintaining partnerships has evolved”. Figure 40 below illustrates how Theme 8 was developed from a second cycle code in the form of a thematic map. Figure 40 shows that the analysis of data generated 1 second cycle code – “Change in approach to maintaining partnerships” - which was developed from 4 first cycle codes – “Long-term partnerships”; “Maintenance of partnerships”; “Trust”; and “Future commitment” - and this was used to develop Theme 8 - “The approach to maintaining partnerships has evolved”.

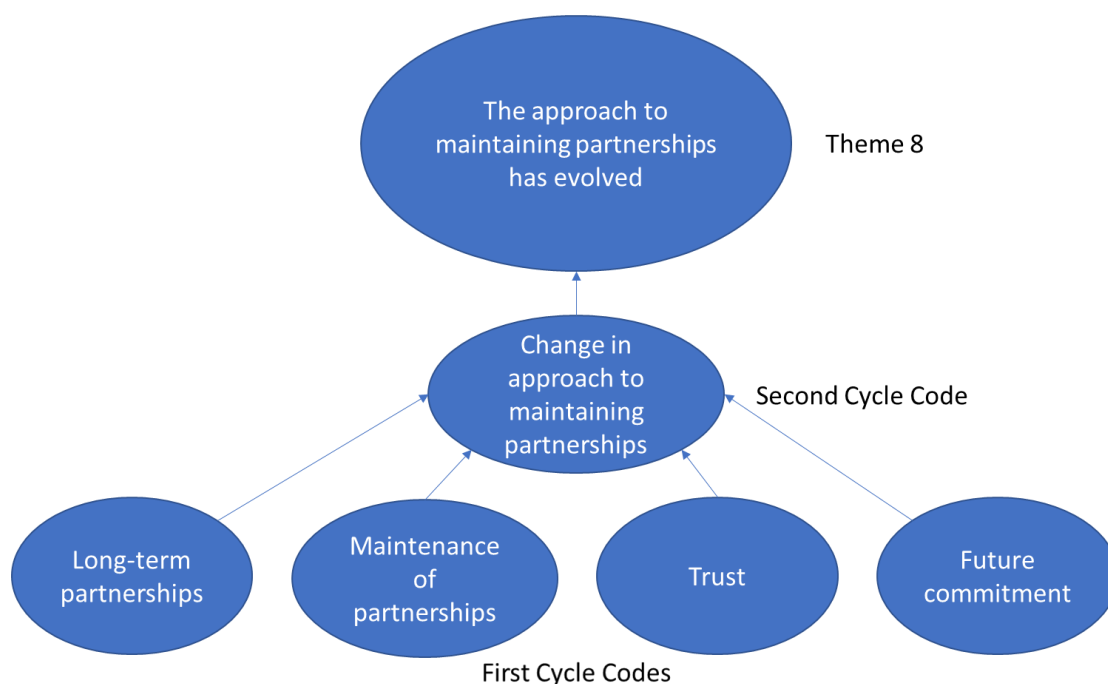


Figure 40: Thematic map - Generation of Theme 8

This study identified a gap in the social marketing literature with respect to how partnerships are created and maintained in social marketing campaigns and this research aims to generate a greater understanding in this area. The findings demonstrate that the approach to maintaining partnerships at PHE is changing to reflect the change to partnerships as strategy. The shift from creating a large number of signposting partnerships to a small number of strategic partnerships has led to an increased emphasis at PHE on the maintenance of partnerships with strategic partners. The data suggest that as the reason why PHE create partnerships changed there was a need to develop long-term partnerships with strategic partners who had the potential to affect behaviour change in PHE's target audiences. The creation of strategic partnerships required a change in the way PHE managed their partnerships. Instead of trying to create more and more partnerships to support the various campaigns, PHE changed to a model of maintaining a smaller number of long-term, strategic partnerships, which supported a campaign or issue over a long period of time or supported several campaigns/issues. PHE believe there are several benefits to having a long-term approach to partnerships. These include - greater depth of relationship; not having to start from scratch each time; increased credibility; building on what went before; greater understanding between the two organisations; increased trust; and, ultimately, greater success.

The findings highlight that the approach to partnerships taken by PHE changed to focus on creating long-term partnerships with a smaller number of "strategic" partners who could provide deeper support on a single issue or across a range of issues. The creation of long-term strategic partnerships required a change in approach as these partnerships

needed greater management to maintain the relationship over time. The maintenance of these partnerships became a key role of the partnerships team.

The partnerships team had to develop different approaches to maintaining different types of partnership – one for strategic partners and one for signposting partners. These different approaches required different levels of maintenance and communication between PHE and its partners. The maintenance of strategic partnerships is seen as more planned and intensive. Strategic partnerships require regular face-to-face meetings to keep each partner updated and to move the relationship forward. The development of personal relationships between people in both organisations is identified as a key success factor. Signposting partnerships require much less maintenance with telephone conversations and e-mail being used more frequently for communication.

Trust is also highlighted as being an important success factor in the maintenance of strategic partnerships. Section 6.2.2 of the previous chapter noted that PHE create and maintain strategic partnerships with organisations that are trusted by the target audience. Trust was also identified in the literature review as a core component of relationship marketing (Morgan and Hunt, 1994) and is required in social marketing (Duane, 2012) to gain permission to broach difficult subjects with the target audience and gain the commitment required from them to change. The findings in this study demonstrate the requirement for trust to maintain successful long-term, strategic partnerships and there is a need for trust not just between PHE and the partner but also between the partner and the target audience (see section 7.4.4 below).

7.4.1 Second cycle code – Change in approach to maintaining partnerships

Theme 8 – “The approach to maintaining partnerships has evolved” – is developed from the second cycle code – “Change in approach to maintaining partnerships”. This second cycle code is a pattern code generated from a bringing together of 4 first cycle codes – “Long-term partnerships”; “Maintenance of partnerships”; “Trust”; and “Future commitment” – that were developed from the data ascribed to the initial code of Partnerships Development Process. Examples from the data that make up each of these 4 first cycles codes are presented in the following sections: 7.4.2 - Long-term partnerships; 7.4.3 - Maintenance of partnerships; 7.4.4 – Trust; 7.4.5 – Future commitment; and the full data set can be found in Appendix E.

In brief, PHE aim to develop a small number of *long-term partnerships* and this has changed the focus of the partnerships to the *maintenance of partnerships*. Key to the success of these partnerships is *trust* and *future commitment*. PHE have changed their

approach to maintaining partnerships to respond to the change to partnerships as strategy, which means *the approach to maintaining partnerships has evolved*.

7.4.2 First cycle code - Long-term partnerships

As noted above, the data suggest that as the rationale behind why PHE created partnerships changed there was a need for PHE to develop long-term partnerships with strategic partners who had the potential to effect a change in behaviour in PHE's target audiences. This required the partnerships team to change their approach and to focus on building long-term relationships with strategic partners and developing personal relationships with key personnel of the partner. This is evidenced by the following quotations.

"Obesity needs long-term partnerships and there are ready-made players who can influence the childhood obesity agenda" (PHE respondent G - Interview 18).

"A partnership is based on relationship building and you get a hell of a lot more out of an organisation if you've had time to build that relationship. So, you just get a better quality of relationship when it's a longer-term relationship...so, you're more likely to be successful in what you're trying to do if you have a longer-term relation, because you get to know each other a hell of a lot more" (Partnerships agency respondent A - Interview 2).

7.4.3 First cycle code - Maintenance of partnerships

The data suggest the change to creating long-term, strategic partnerships to effect behaviour change required the partnerships team to change its focus from creating new partnerships to maintaining the strategic partnerships. This necessitated a reallocation of resources within the team with more time and energy being allocated to building and maintaining relationships with strategic partners. This is evidenced in the following quotation:

"But I think the real, kind of, work has actually been in maintaining that...because it takes a lot of work to do that. And it takes a lot of, kind of, maintenance of that relationship" (PHE respondent A - Interview 1).

PHE have developed a key relationship management approach for maintaining partnerships, which involves identifying three tiers of partner. The top tier are PHE's key strategic partners and the partnerships team manage the relationship with these partners very intensely, essentially on a day-to day basis. Then there are a middle tier of partners who PHE want to keep active but don't feel they necessitate day-to-day management.

Finally, there are a lower tier of partners who are managed remotely through e-mail. This approach is exemplified in the following quotations.

“We now have like this key relationship management model so that we have identified the top sort of ten, twenty partners who have the most impact, are potentially investing the most amount of time and energy or have something on their corporate agenda that, you know, aligns to what we're doing. And they're the ones that we really day to day manage really intensely and closely, so people like [partner name] and [partner name], and then you've got a kind of middle tier of those who are very active and, again, don't require day to day managing but, you know, where we've got really intense relationships they do, they do need managing because they need to understand where we're going, what we're doing and you need good personal relationships as well” (PHE respondent E - Interview 16).

“The model that we have adopted we've called a key relationship management approach and I guess it operates like a pyramid. At the top you've got a few very big strategic partners who deliver high impact, high value partnership activity, possibly based on more than one campaign often...and then you kind of have a middle tier where those which, you know, are very important and can deliver on one or more campaigns but not on such a sort of... so huge scale and then you've got a sort of supporting level of partners who are interested in working with us and can support in some ways but not potentially with as big a scale” (PHE respondent F - Interview 17).

7.4.4 First cycle code - Trust

The findings highlight that PHE see trust as an important factor in the successful maintenance of long-term, strategic partnerships. Two different aspects of trust were identified – (i) trust between PHE and the partner, and (ii) trust between the partner and the target audience. With regards to the trust between PHE and its partners the data identified a belief that openness and honesty are key to establishing and maintaining trust. In addition, having clear objectives for the partnership and working together to deliver on what has been agreed were seen as ways to build trust. This is evidenced in the following quotations.

- i. Openness and honest - *“It's hard to pinpoint how you establish the trust. I think it's definitely about openness and honesty” (PHE respondent F - Interview 17).*
- ii. Clear objectives - *“I think you just really need to be building that trust...so, I think it's that really clear objectives but also what's a no-go from both sides.*

And sometimes those things just crop up as you go along. But I think that's the best way to build trust" (PHE respondent A - Interview 1).

- iii. Trust with the target audience - *"Leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and the credibility that they can provide"* (Partnerships agency respondent B - Interview 5).

7.4.5 First cycle code - Future commitment

The data in this study of PHE suggest that there is a commitment to the future from both parties. In particular, the strategic partners appeared to be committed to the relationship with PHE and this is seen to an important element in the maintenance of a long-term, strategic partnership. This is evidenced in the following quotations.

"Hopefully to continue. As I say I think we have got a really, really good working relationship" (Commercial partner respondent E - Interview 21).

"And we think and we know that actually we want to continue the journey...that could be a very big win, I think, both for Change4Life and us" (Commercial partner respondent D - Interview 12).

"I think it's something that can only grow. I just see us, you know, continuing to get even closer in terms of planning and looking at strategy" (Commercial partner respondent B - Interview 8).

7.5 Theme 9 – The role of the Partnerships Team has evolved to reflect the change in approach to partnerships

Theme 6 also informed Theme 9 - "The role of the Partnerships Team has evolved to reflect the change in approach to partnerships". Figure 41 below illustrates how this initial theme was developed from a second cycle code in the form of a thematic map. Figure 41 shows that the analysis of data generated 1 second cycle code – "Change in role of partnerships team", which was developed from 2 first cycle codes – "Change in importance of partnerships team"; and "Change in structure of partnerships team", and this second cycle code was used to develop the theme of "The role of the partnerships team has evolved to reflect the change in approach to partnerships".

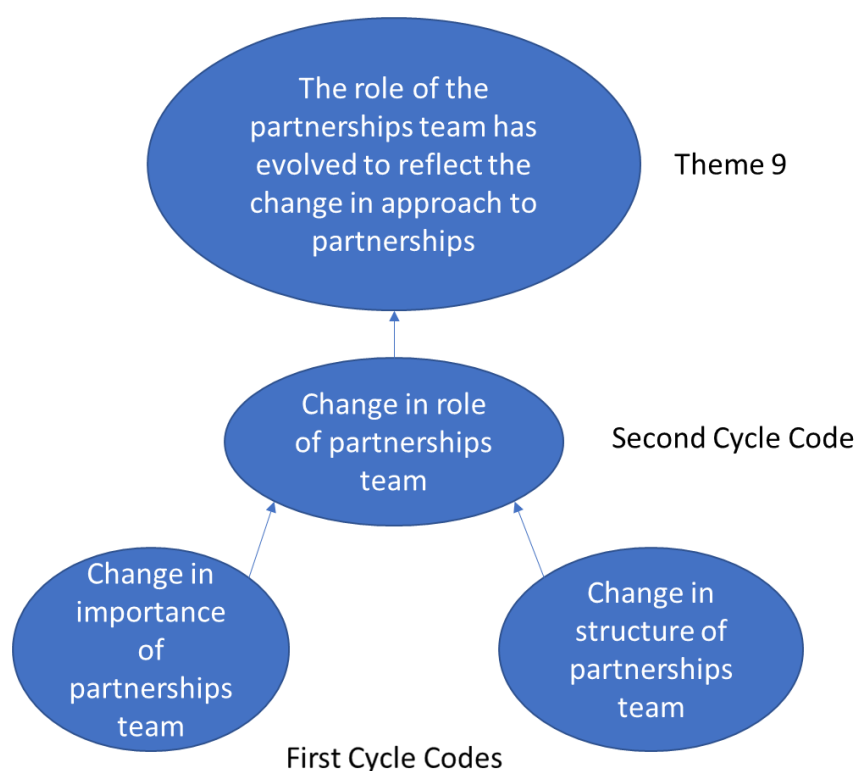


Figure 41: Thematic map – Generation of Theme 9

The documentation, observation and interview data suggest the role of the partnerships team at PHE has changed to reflect the change to partnerships as strategy identified in the previous chapter. The findings highlight that PHE view partnerships as integral to their social marketing strategy and have a team dedicated to creating and maintaining partnerships. This is a different approach to that found in the social marketing literature where no reference was made to the need for a specific team to create and maintain partnerships as part of the social marketing approach. The findings identified that PHE's Partnerships team are positioned on an equal level within the PHE Marketing team to the other two teams that make up the Marketing department – the Strategy & Planning team and the Campaigns team - demonstrating the importance given to partnerships in PHE's approach to social marketing. This is evidenced by the change in organisational structure of the PHE Marketing team as shown in Figure 36 in section 7.1 above, which shows that after a restructure of the PHE Marketing team in 2012 a stand-alone Partnerships team was created led by the Deputy Director - Partnerships (highlighted in green) who reports directly to the Director of Marketing.

7.5.1 Second cycle code – Change in role of partnerships team

Theme 9 – "The role of the Partnerships Team has evolved to reflect the change in approach to partnerships" – is developed from the second cycle code – "Change in role of partnerships team". This second cycle code is a pattern code generated from a bringing

together of 2 first cycle codes – “Change in importance of partnerships team”; and “Change in structure of partnerships team” - that were developed from the data ascribed to the initial code of Partnerships Development Process. Examples from the data that make up each of these 2 first cycles codes are presented in sections 7.5.2 to 7.5.3 below and the full data set can be found in Appendix E.

In brief, the data suggest the *importance of the partnerships team* and the *structure of the partnerships team* has changed over time. This is reflected in a change in the *role of the partnerships team* that has led to *the role of the Partnerships Team has evolved to reflect the change in approach to partnerships*.

7.5.2 First cycle code – Change in importance of partnerships team

The data identified that PHE have a specific Partnerships team within their Marketing team and the importance of the Partnerships team has increased in response to the greater significance of partnerships to PHE’s social marketing strategy. Initially, when Change4Life was launched in 2009, partnerships were managed as part of the Campaigns Team. This reflected the role of partnerships at the time as being a tactical tool to amplify the campaign messages. However, as partnerships became a core component of the Social Marketing Strategy so the importance of the Partnerships Team increased. They are now seen to have equal significance to the Planning Team and the Campaigns Team and are brought in at the start of any campaign development to ensure the needs of partners are considered from the start. The team has increased in size, has its own budget and has gained more respect within PHE. This is exemplified in the following quotations.

- i. Importance of Partnerships - *“I mean actually it [partnerships] sits equally with activation and planning. So, I think PHE's strategic decision has been that partnerships are just as important as how you activate and also the strategy of planning function. So, it's an absolutely fundamental part of the future of how we're going to deliver things”* (PHE respondent E - Interview 16).
- ii. Importance of Partnerships - *“Partnerships is a third and equal discipline in the overall marketing approach... it's not an afterthought, it's the third equal strand in the overall marketing approach”* (PHE respondent G - Interview 18).
- iii. Size of Partnerships Team - *“We are the largest partnerships team in government and work with 214 key national and 70,000 local partners. These partners are the foundation of an approach that supports at risk audiences in making changes to their behaviours day in day out”* (DOC6 - PHE Marketing Strategy 2014-17).

The increase in importance of partnerships has also led to a change in the structure of the partnerships team and this will be presented in the next section.

7.5.3 First cycle code – Change in structure of partnerships team

In addition to recognising that PHE have a specific Partnerships team, the data identified that the structure of this team had changed over time. This change in structure reflects the change in approach to partnerships as they have become a core component of PHE's social marketing strategy. This change in structure is relevant to how PHE create and maintain partnerships as part of their national social marketing campaigns.

As noted in section 7.5.2 above, partnerships were initially managed as part of the Campaigns team and there were 5 people responsible for creating partnerships with the support of a partnerships agency. These people all reported to the Head of Campaigns and the budget for partnerships activity came from within the campaign activation budget. A restructure of the PHE Marketing team took place in 2012 with the creation of a stand-alone Partnerships team (see Figure 35 above). This team now sits outside of the Campaigns team and are led by a Deputy Director - Partnerships who reports directly to the Director of Marketing.

After the restructure in 2012 the Partnerships team still consisted of 5 people plus the partnerships agency, however, by 2017, when this study was conducted, the Partnerships team had grown to consist of 20 people within PHE plus the partnerships agency. The findings highlight that along with the change in structure of the Partnerships team there is a recognition that the skills required by people working in the Partnerships team differ from the skills needed by those people working in the Campaigns team. This also relates to how partnerships are created and maintained. People involved in the creation and maintenance of partnerships do need to have a good understanding of social marketing but on top of this require negotiation, listening, relationship management, collaborative working, public and private sector understanding and sales skills. This is evidenced in the following quotations.

- i. Skills of partnerships team - *“People that work on the [partnerships] team...have got experience and skills in the area...have an aptitude for negotiating, for listening, and are also marketing experts”* (Partnerships agency respondent B - Interview 5).
- ii. Additional skills required by partnerships team - *“Our partnerships staff are significantly different to other marketing colleagues. If you look at our skill set, there is a clear need to be able to build those relationships...I think you need to build a skill set that can cope with the uncertainty of managing partnerships, that*

you don't have a complete grip on it at all times, that you are a sales person to some degree, and, so there's a bit about the workforce that is different. But you still need that understanding of marketing" (PHE respondent D -Interview 15).

7.6 Theme 13 - Understanding partners is essential to building long-term relationships

Theme 13 is generated from the data attributed to "Other" and is – "understanding partners is essential to building long-term relationships". Theme 13 impacts on Themes 8 and 9 as it is relevant to how partnerships are maintained and the role of the partnerships team. PHE aim to maintain strategic, long-term partnerships and this requires the partnerships team to develop an understanding of these partners. Figure 42 below illustrates, in the form of a thematic map, how this theme was developed from the first and second cycle codes. Figure 42 shows that the analysis of data identified 1 first cycle code – "Partner needs". This first cycle code was further analysed to develop the second cycle code of "Understanding the partner", and this was used to generate the theme of "Understanding partners is essential to building long-term relationships".

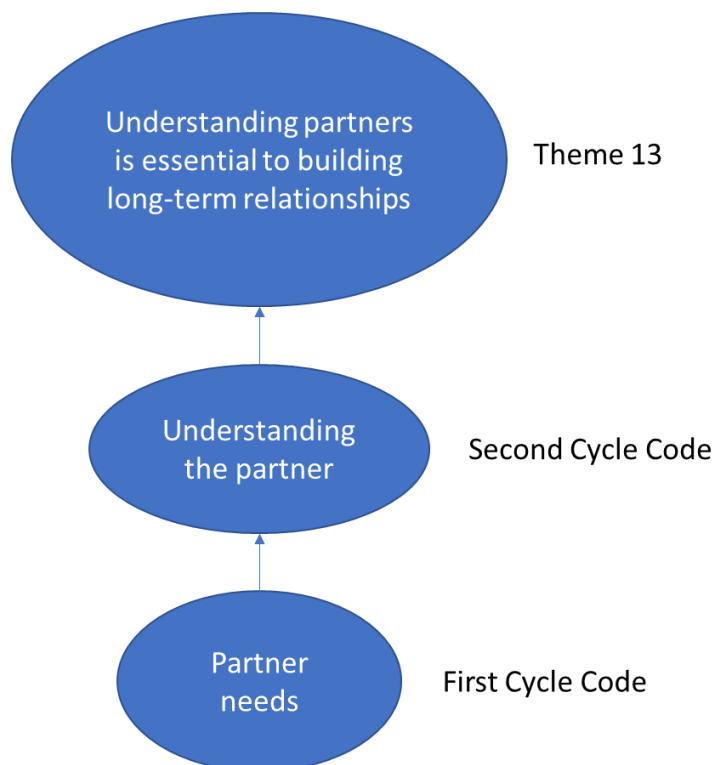


Figure 42: Thematic map – Generation of Theme 13

7.6.1 Second cycle code – Understanding the partner

Theme 13 – "understanding partners is essential to building long-term relationships" – is developed from the second cycle code – "understanding the partner". This second cycle

code is a pattern code generated from a first cycle code identified in the data initially coded to “Other” – “Partner needs”. Examples from the data that make up this first cycle code are presented in section 7.6.2 below and the full data set can be found in Appendix E. In brief, the data suggest *understanding partner needs is essential to building long-term relationships*.

7.6.2 First cycle code - Partner needs

PHE have identified mutual benefit as an important part of creating and maintaining partnerships. To enable PHE to identify where there might be mutual benefit in a partnership they first have to understand the needs of the partner. Commercial partners are seen to have different needs from public sector partners. For commercial partners there is a primary need to increase or maintain sales but they also have corporate social responsibility and sustainability needs. Public sector partners need to know that PHE’s national campaigns can be applied to a local population, they also need to feel included and listened to in the development of campaigns, and they need to have data that can help them make the case for supporting PHE’s campaigns to their stakeholders. One need common to both categories of partner is being given enough time by PHE to work together effectively on campaigns and there is a suggestion that PHE’s planning timelines are not helpful for partners. Commercial partners in particular are planning 18 months ahead whereas PHE are restricted in their planning by Government requirements. These partner needs are evidenced in the following quotations.

- i. Commercial partner needs - *“On the commercial side, it’s really about achieving some social responsibility or sustainability objectives. It’s also an opportunity, a very practical opportunity, to, sort of, encourage their customers to buy products that are healthy. So, it’s about driving sales as well.”* (PHE respondent A - Interview 1).
- ii. Public sector partner needs - *“Particularly in local authorities, probably I would say that they need the same kind of lead times that we require, that they need the same kind of business case data, evaluation to make their case to their colleagues, their senior colleagues.”* (PHE respondent D - Interview 15).
- iii. Need for advance notice - *“Timing, not understanding each other’s timings. The long-term marketing plans are really set in stone. So, I understand they’ve [PHE] got to go through their process. We’ve got to understand each other’s processes really, and timescales.”* (Commercial partner respondent C - Interview 9).

7.7 Chapter summary

This study identified that the process for how PHE create and maintain partnerships in their national social marketing campaigns has evolved and it now focuses on the development of long-term strategic partnerships that can effect a change in behaviour in their target audiences. This new process consists of a 7-stage approach to creating and maintaining partnerships with commercial sector organisations and a 5-stage approach with public sector organisations. PHE believe there is greater risk to them when working with commercial partners and this requires greater governance to be put in place, which accounts for the additional 2 stages of agreeing a partner narrative and agreeing governance procedures.

The PHE Marketing team includes a Partnerships team that manage the creation and maintenance of partnerships and this team are on an equal footing with the Strategy & Planning team and the Campaign Creation team in the overall strategic approach to social marketing. The Partnerships team are seen to have distinctive skills and experience that set them apart from the rest of the PHE Marketing team, which are specific to partnerships, and these include negotiation, listening, relationship management and collaborative working. In particular, there is a need for the Partnerships team to develop an understanding of the partners with whom PHE aim to create and maintain strategic partnerships with.

These findings provide a greater understanding of how PHE create and maintain partnerships as part of their national social marketing campaigns. The next chapter, Chapter 8, looks at the outcomes of the partnerships PHE create and maintain.

Chapter 8

Outcomes of partnerships - the outcomes of the partnerships PHE create as part of their national social marketing campaigns

8.1 Introduction

The overarching objective of this study is to generate a greater understanding of the use of partnerships in national social marketing campaigns and this provides the focus for the first research question (RQ1). One of the key elements of this is to gain an understanding of the outcomes of partnerships in social marketing and the fifth research question (RQ5) in this study looks specifically at this by asking – what are the outcomes of the partnerships that are created and maintained to support national social marketing campaigns? Thematic analysis was applied to the analysis of all data collected in this study (documents, observation, and interviews) and, in line with the Critical Realist philosophy, an abductive approach was followed. The research of Agostini and Nosella (2017) provided the framework to guide the generation of four initial codes and the third of these codes is “outcomes”. Gaining knowledge of outcomes supports a greater understanding of the outcomes of the partnerships PHE create and maintain to support their national social marketing campaigns.

A framework was developed in this study to provide a visual representation of the findings from the research and this is presented in Figure 43 below. The findings from the data allocated to the initial code of “Outcomes” were brought together under the heading of “Outcomes of partnerships” in this framework and are highlighted in green of the right of Figure 43.

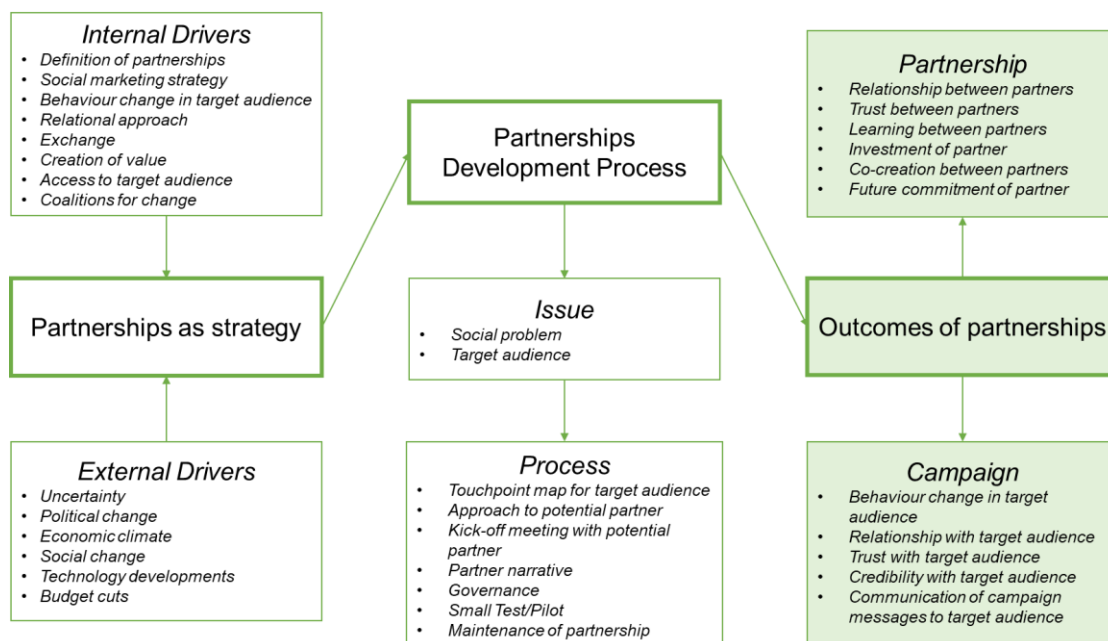


Figure 43: Framework highlighting the findings relating to “outcomes of partnerships” in national social marketing campaigns

As identified in the findings from Chapter 6, PHE now create and maintain strategic partnerships to effect a change in the behaviour of their target audiences. In addition, PHE also create signposting partnerships to gain access to the partners’ channels for the communication and amplification of the campaign messages. This rationale provides the context for what can be considered to be the outcomes of partnerships.

The findings in this study demonstrate that the measurement of the outcomes of partnerships is a particular issue for PHE. The observation and interview data identify that the PHE Marketing team find it difficult to measure outcomes and need to develop ways to achieve this. The change in strategic importance of partnerships at PHE led to a change in focus on outcomes in two key areas – (i) outcomes related to the campaigns, and (ii) outcomes related to the partnerships themselves. However, PHE have been unable to develop effective “Partnership Value Metrics” that can be used to measure the outcomes relating to the campaigns and the partnerships themselves. This is because many of the outcomes of partnerships are seen by PHE as intangible, for example the value and quality of a relationship. In addition, the outcomes are difficult to isolate out and measure, for example the impact of a specific strategic partnership on a change in behaviour.

The literature proposes that the more intangible a phenomenon is deemed to be, the more challenging it is to evaluate (Zeithaml, 1981). This demonstrates the value of having a definition of partnerships in that it can make the intangible more tangible. This study proposes a definition of the concept of partnerships as strategy in social marketing and this is as follows:

Partnerships as strategy is a macro-level approach that views the idea of partnerships as a whole rather than seeing it as simply the individual partnerships.

In addition, definitions of strategic partnerships and signposting partnerships are also proposed and these are as follows:

A strategic partnership in social marketing is a long-term relationship between two organisations with a shared objective to effect behaviour change in a target audience and where a complex exchange takes place and value is co-created to provide mutual benefit for all parties.

A signposting partnership in social marketing is a short-term relationship between two organisations where a restricted exchange takes place that provides value to both parties.

These definitions suggest tangible outcomes of partnerships in social marketing including - (i) the relationship; (ii) the shared objective; (iii) the exchange; (iv) the value created; and (v) the mutual benefit.

The interview data identified a potential approach to measuring the outcomes of partnerships in social marketing, which combined with the definitions above provides a way of developing an Outcomes model. The suggestion is to consider the existing models that PR and media agencies use, for example attribution modelling. Attribution models provide frameworks for analysing which channels or touchpoints lead to a customer action, e.g. a sale or a conversion. An attribution model approach can be applied to the touchpoints of partnerships in social marketing to help isolate out the outcomes of each partnership. There is also the opportunity for partners to provide measurement data, e.g. sales data, that can be used to feed into a model to provide a tangible measure of the outcomes of partnerships.

The literature review for this study found no reference to metrics for measuring the outcomes of partnerships in social marketing. As partnerships are becoming an increasingly important part of social marketing the development of robust metrics and models for measuring their outcomes would be of great benefit to practitioners. This will be discussed further in Chapter 9 of this study.

The analysis of all data attributed to the initial code of “outcomes” produced 12 first cycle codes and the data related to these were further analysed and reviewed to develop 3 second cycle codes, from which 3 themes emerged with regards to the outcomes of partnerships in social marketing. A thematic map is used to visualise the relationships between each theme, and this is shown in Figure 44 below. A detailed explanation of each theme is presented in sections 8.2 to 8.4 below with the links between these findings and the extant theory identified in the literature review being explored. Within these sections

the evidence from the data that supported the development of the first and second cycle codes is also provided. The complete data tables are included in Appendix E.

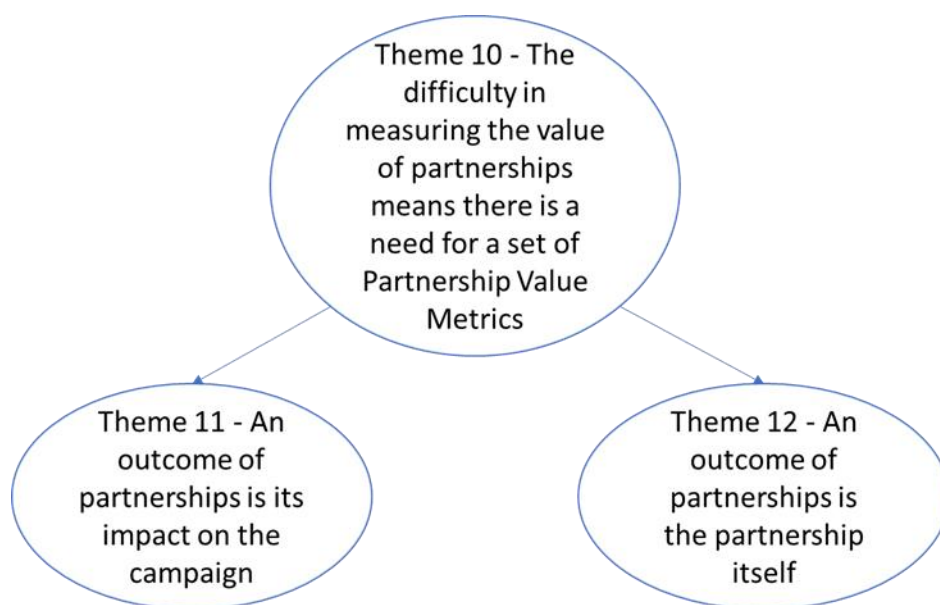


Figure 44: Thematic map generated from the data attributed to the initial code of outcomes

8.2 Theme 10 – The difficulty in measuring the value of partnerships means there is a need for a set of Partnership Value Metrics

Theme 10 is generated from the data attributed to the initial code of outcomes and is – The difficulty in measuring the value of partnerships means there is a need for a set of Partnership Value Metrics. Figure 45 below illustrates, in the form of a thematic map, how this theme was developed from the first and second cycle codes. Figure 45 shows that the analysis of data identified 3 first cycle codes – “Measurement of outcomes”; “Intangibility of partnerships”; and “Outcomes model”. These 3 first cycle codes were brought together under the second cycle code of “Difficulty in measuring value of partnerships”, and this was used to develop the theme of “The difficulty in measuring the value of partnerships means there is a need for a set of Partnership Value Metrics”.

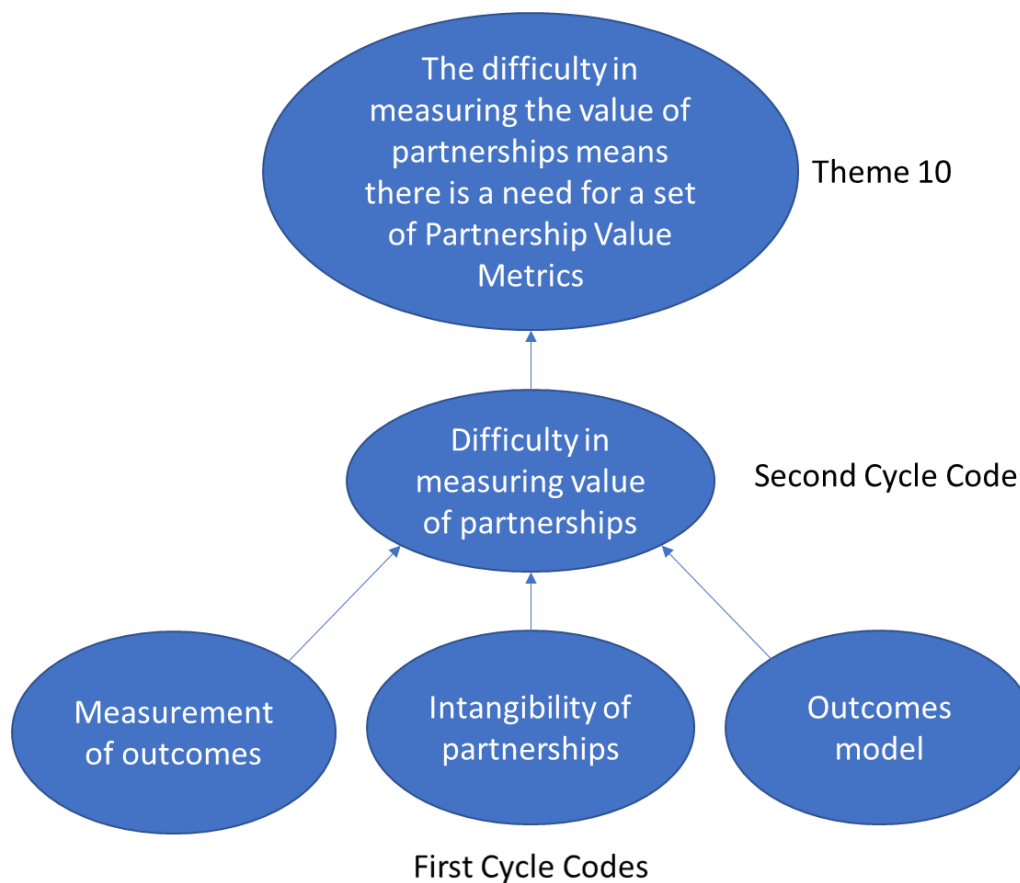


Figure 45: Thematic map – Generation of Theme 10

The fifth research question in this study (RQ5) asks - what are the outcomes of partnerships in national social marketing campaigns? The findings highlight that the measurement of the outcomes of partnerships is a particular issue for PHE and the observation and interview data identify that PHE have difficulty in measuring the outcomes of partnerships and need to develop ways to achieve this. When PHE began creating partnerships in 2009, the reach and frequency of communications by partners were seen as outcomes but these are now recognised to be outputs. Rather than measuring the output of the partnerships, e.g. the activity a partner carries out to support a campaign, PHE now want to measure what happens with regards to the behaviour of the target audience as a result of partnerships. PHE aim to achieve influence on the target audience as a direct result of partnerships with the ultimate outcome being a measurable change in behaviour. However, PHE are struggling to measure the outcomes of partnerships because these outcomes are seen as intangible. The change from creating partnerships to access partners' channels to creating and maintaining partnerships to effect a change in behaviour of the target audience has made the task of measuring the outcomes of partnerships more difficult and necessitated a change to the requirement for outcomes measures. PHE now need to develop an Outcomes Model that measures the strategic

value of partnerships both to the campaigns and to the organisations involved in the partnerships.

8.2.1 Second cycle code – Difficulty in measuring value of partnerships

Theme 10 – “the difficulty in measuring the value of partnerships means there is a need for a Partner Value Metric” – is developed from the second cycle code – “difficulty in measuring value of partnerships”. This second cycle code is a pattern code generated from a bringing together of 3 first cycle codes that describe findings from the data – “measurement of outcomes”; “intangibility of partnerships”; and “outcomes model”. Examples from the data that make up each of these 3 first cycle codes are presented in sections 8.2.2 to 8.2.4 below and the full data set can be found in Appendix E.

In brief, the data suggest the *measurement of outcomes* relating to partnerships is difficult due to the *intangibility of partnerships* and the lack of an *outcomes model* at PHE. PHE have difficulty in measuring the value of the partnerships they create and maintain in their national social marketing campaigns and there is a need to create Partnership Value Metrics.

8.2.2 First cycle code - Measurement of outcomes

As noted above, the fifth research question (RQ5) in this study is focused on generating a greater understanding of the outcomes of partnerships in social marketing. Data relating to outcomes were identified in the documents and observation, and it was the seventh question participants were asked in the interviews.

The findings demonstrate a change in the measurement of outcomes reflecting the change in why PHE create partnerships and how the partnerships are created and maintained. When Change4Life was launched in 2009, partnerships were created to access the partners’ channels. The outcomes of these partnerships were seen as the reach and frequency of Change4Life communications through partner channels and they were measured with an approximate financial value based on an estimation of what it would have cost for PHE to buy this activity. This financial measurement is exemplified in the following quotations from the documentary data.

“Commercial sector in-kind contributions for Change4Life grew from £9 million in 2009/10 to £12 million in 2010/11” (DOC4 - Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011).

“Partnerships leveraged an additional £75 million of in-kind support and generated free editorial and media coverage valued at £37 million” (DOC6 - PHE Marketing Strategy 2014-17).

PHE now create and maintain partnerships to effect a change in behaviour in their target audiences and the measurement of the outcomes of partnerships has changed to reflect this. Partnerships are still measured in monetary value but also in impact on behaviour change as exemplified in the following quotation.

“Commercial partnerships have generated over £123 million of in-kind support since 2009...the partnership with Disney has nudged over a million previously inactive children into an additional 100,000 minutes of physical activity as part of the 10-minute shake up campaign...partnerships with grocery retail and manufacturers have helped to encourage shoppers to trial healthier options via money-off vouchers and point-of-sale advertising in 15,000 high street retailers”
(DOC8 – PHE Social Marketing Strategy 2017 to 2020).

The observation and interview data suggest PHE are finding it difficult to measure some of the outcomes of their partnerships, particularly in relation to behaviour change. PHE have not been able to find accepted industry norms for the value of partnerships and they have difficulty separating out the effect of partnerships from the overall campaign activity. Some behavioural measures have been identified, e.g. app downloads, but these cannot be attributed to a specific partnership. In addition, PHE have no measure for the impact of the relationship and trust a partner has with the target audience. There are measures relating to the success of the partnerships team, for example how many partners they worked with, how many channels they accessed, and the level of co-creation with partners, but these were now seen as outputs rather than outcomes. Having no agreed partnerships value metrics is identified as a problem for the Partnerships team when reporting back on their return on investment and it was stated that their work would receive greater recognition if they had these measures. This is demonstrated in the following quotations.

- i. Difficulty in measuring outcomes - *“One of the things that's always been difficult for partnerships, is that it's been really hard to measure”* (PHE respondent A - Interview 1).
- ii. Difficulty in measuring behavioural outcomes - *“Ideally it would be behavioural...but that's quite difficult to measure”* (PHE respondent C - Interview 14).
- iii. Difficulty in measuring the impact of a partner on behaviour change - *“It's really, really difficult to measure the impact that a partner has on behaviour change, particularly obesity. That's longer term”* (Partnerships agency respondent A - Interview 2).
- iv. Difficulty in separating partnerships and campaign activity - *“Unpicking the impact of that partnership when you're looking at an overall campaign evaluation is really challenging”* (Partnerships agency respondent D - Interview 19).

The difficulty in measuring the outcomes of partnerships is linked to their intangibility and this will be discussed in the next section.

8.2.3 First cycle code - Intangibility of partnerships

The data suggest PHE have difficulties in measuring the outcomes of partnerships and this is related to the intangibility of partnerships. The building of a long-term relationship between PHE and a strategic partner is seen as key to a successful partnership but this is not regarded as a tangible measure. In addition, the exchange between PHE and the partner can be intangible, for example the sharing of ideas or data and providing organisational support such as staff time. It is noted that there is an opportunity to make the intangible more tangible, for example if a partner can provide sales data and other measurement data to feed into a model that can then provide a measure of the outcome of the partnership. This is evidenced in the following quotations.

- i. Intangible nature of partnerships - *"I think the big challenge around partnerships is that they are quite intangible. Like, a lot of it's a very intangible relationship and it takes a long time. And it's very hard to talk about...but it's so long-term that it can feel quite intangible"* (PHE respondent A - Interview 1).
- ii. Intangible outcomes of partnerships - *"It can be non-tangible, the exchange of either providing content, resources, ideas, support, and that working reciprocally with the other partner as well"* (Local authority respondent D - Interview 13).
- iii. Making the intangible more tangible - *"I think where it can get pulled through into measurement is where we do something with an organisation that collects basket shopping data, and that we can work with them to prove that if somebody is engaged in our communication, their shopping basket changes, as opposed to somebody who isn't engaged. So, where you can pull it through to actual sales data, is fantastic"* (PHE respondent G - Interview 18).

This intangible nature of partnerships meant that PHE had no model for measuring outcomes and this will be discussed in the next section.

8.2.4 First cycle code - Outcomes model

The observation and interview data highlight that PHE do not have a model to measure the outcomes of their partnerships, particularly the impact they have on effecting behaviour change. It was suggested that PHE could learn from the attribution modelling used by PR and media agencies. This code is supported in the following quotation.

“I think partnerships could learn quite a lot from the attribution modelling that media agencies are doing in a non-behaviour change way” (Partnerships agency respondent B - Interview 5).

8.3 Theme 11 – An outcome of partnerships is its impact on a campaign

Theme 11 is generated from the data attributed to the initial code of outcomes and is - An outcome of partnerships is its impact on a campaign. Figure 46 below illustrates, in the form of a thematic map, how this theme was developed from the first and second cycle codes. Figure 46 shows that the analysis of data identified 5 first cycle codes – “Financial measures”; “Change in behaviour of target audience”; “Brand-building”; “Building coalitions”; and “Data and evaluation”. These 5 first cycle codes were brought together under the second cycle code of “Outcomes related to a campaign”, and this was used to develop the theme of “An outcome of partnerships is its impact on a campaign”.

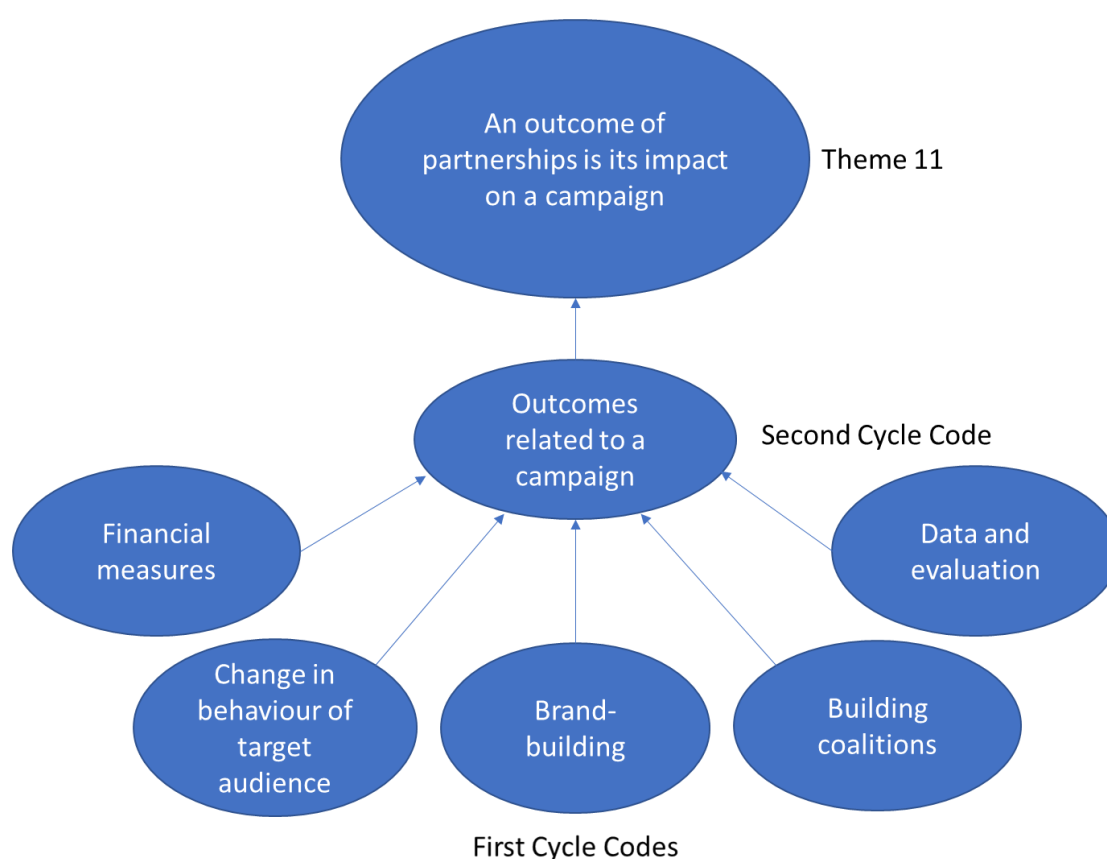


Figure 46: Thematic map – Generation of Theme 11

The findings demonstrate that PHE, as a public body, have different objectives to commercial organisations. PHE are focused on improving the health of people in England and the Marketing team see the outcomes of the partnerships in relation to the campaigns they create rather than economic or strategic outcomes for PHE as an organisation.

However, if the campaigns are successful this can be of benefit to PHE as a whole in terms of reputation and future funding. PHE now see partners as having the opportunity to effect a change in behaviour of their target audiences and have evolved their thinking with regards to the value of partnerships to their campaigns from purely a financial value to more of an impact value in relation to behaviour change.

PHE still see partnerships as providing financial support to their national social marketing campaigns by delivering activity that extends the campaign budgets. But they also view the partnerships as supporting the campaigns by effecting a change in the behaviour of the target audience. In addition, PHE understand that partners can help to build their campaign brands through brand association and promotion. They also believe that the building of coalitions of partners support the campaigns by enabling them to be present in the daily lives of the target audience. Finally, partners can also support the campaigns by providing their own data and evaluation, which PHE would not normally have access to.

8.3.1 Second cycle code – Outcomes related to a campaign

Theme 11 – “an outcome of partnerships is its impact on a campaign” – is developed from the second cycle code – “outcomes related to a campaign”. This second cycle code is a pattern code generated from a bringing together of 5 first cycle codes developed from the Outcome data – “financial measures”; “change in behaviour of target audience”; “brand-building”; “building coalitions”; and “data and evaluation”. Examples from the data that make up each of these 5 first cycle codes are presented in sections 8.3.2 to 8.3.6 below and the full data set can be found in Appendix E.

In brief, the data suggest the *outcomes related to a campaign* include factors relating to *financial measures* (e.g. estimated value of what it would cost to buy the activity delivered by partners), *change in behaviour of the target audience* (e.g. a sustained increase in physical activity levels due to activity delivered by partners), *brand-building* (e.g. increased awareness of a PHE campaign brand due to association with partners), *building coalitions* (e.g. bring together a group of partners under one campaign), and *data and evaluation* (e.g. sales data from or measurement of activity delivered by partners).

8.3.2 First cycle code - Financial measures

Initially, PHE created partnerships to gain access to the partners’ channels and the outcomes of the partnerships were measured as a monetary value based on an estimate of what it would have cost PHE to buy access to those channels. This helped to raise the stock of partnerships within the PHE Marketing team as PHE’s marketing budget had

been reduced over time and so an outcome of the partnerships was extending the marketing budget with in-kind support. This code is evidenced in the following quotations.

“There are financial outcomes, whether they’re cash or in-kind” (PHE respondent E - Interview 16).

“On average now we’re [partnerships] still delivering £X [amount stated] a year in value to the [Change4Life] campaign. And that is against a backdrop where the investment from the Department of Health and Public Health England has declined significantly” (Partnerships agency respondent C – Interview 11).

“There’s huge financial value to what we do, really adding to the reach that we achieve through our advertising and to actually getting people to do something in real life” (PHE respondent F - Interview 17).

This last quotation also suggests that partnerships can have an impact on behaviour change and this will be discussed in the next section.

8.3.3 First cycle code - Change in behaviour of target audience

PHE now create partnerships because they see them as providing an opportunity to effect a change in behaviour in their target audiences and this is now viewed as one of the outcomes of partnerships. Partners provide PHE and their campaigns with the opportunity to be present at the point of decision-making or purchase and this is seen as an important campaign outcome. However, the findings highlight that PHE find it difficult to measure this outcome as it is hard to attribute a change in behaviour to a specific partnership. The exception to this appeared to be the partnership PHE have with Disney where levels of physical activity had been measured and reported. This code is exemplified in the following quotations.

“If Public Health England want to influence consumers at the point of decision making in a supermarket, because they’ve understood that actually to create change, that’s where they need to be. And, of course, Public Health England don’t operate in supermarkets, so they need to work with a partner to achieve that” (PHE respondent A - Interview 1).

“The evidence is there on a campaign by campaign basis that contribution of partners is significant to changing behaviour” (Partnerships agency respondent C - Interview 11).

8.3.4 First cycle code - Brand-building

PHE, and DH before them, aim to develop brands for their national social marketing campaigns that support a recognition and interest in their campaigns by the target audience. PHE's branded campaigns include Change4Life, Stoptober, One You and Be Clear on Cancer. The findings highlight that PHE see one of the outcomes of partnerships as supporting the building of these brands. This can be through brand association with iconic partners, such as Disney, and more general brand visibility by continuous promotion through partner channels, e.g. Asda or Boots. PHE believe that the Change4Life brand was built as much by partnership activity as by paid for advertising. This is because for a period of time between 2010 and 2012 the Coalition government put a hold on all government advertising spend and so partnerships activity was the only way the Change4Life brand could be promoted. This code is evidenced in the following quotation.

"Well, if you buy into the idea that brand-building is a good way to deliver on any kind of ultimate behaviour, which I do, I think brand-building's important, then partnerships can help you build brands. It helps you build visibility, but it also helps you cement in consumers' minds what the brand, whether that's One You, Stoptober, Change4Life, what that stands for. I think actually Change4Life is a great example of where that brand has arguably been built as much through partners as it has through paid advertising" (Partnerships agency respondent B - Interview 5).

8.3.5 First cycle code - Building coalitions

As noted in section 6.2.4 above, PHE have an ambition to build coalitions of partners from a range of sectors to support their national social marketing campaigns. They believe this gives the campaigns greater credibility and provides an opportunity to support behaviour change in the target audience by touching different aspects of the target audiences' lives. Having a range of different partners, from different sectors, for example retailers, supermarkets, local government, and the NHS, enables PHE to communicate with the target audience in different settings throughout their day with a consistency of message enabling a more effective campaign. The data suggest an outcome of partnerships is the value of building a coalition of partners to support a campaign or an issue. This code is exemplified in the following quotations.

- i. Reach of a coalition of partners - *"When there's a coalition of partners, it tends to touch different points of the funnel"* (Commercial partner respondent B - Interview 8).

- ii. Effectiveness of a coalition of partners - *“If you get that coalition of supporters all delivering the same message at the same time, you have a much more effective campaign...you piggy-back on the relationship that those other partners have, that otherwise you wouldn’t have as just PHE”* (PHE respondent D - Interview 15).
- iii. Credibility of a coalition of partners - *“When we work with a coalition of partners, the messaging is more credible as a result”* (Partnerships agency respondent D - Interview 19).

8.3.6 First cycle code - Data and evaluation

As noted in section 8.1 above, PHE have difficulty measuring the outcomes of their partnerships particularly with regard to behaviour change. However, one campaign outcome from partnerships is that some partners collect their own data and carry out their own evaluation of the activity they deliver to support PHE. This can provide PHE with access to the expertise of the partners, help develop valuable insight into the target audience and the campaign, as well as provide evidence on the campaign’s impact. It also means PHE do not have to spend money getting the data. This code is evidenced in the following quotations.

“With our wellbeing service we can record whether somebody’s come into the wellbeing service based on a certain campaign” (Local authority respondent B - Interview 8).

“We do have that evaluation that shows weight losses from our point of view...so, we measured how many hits we’d got on our website. Those people then got an e-mail with a voucher e-mailed to them which gave them the choice of either joining a group or joining online as members. Those are our top-line figures. But then we also did some analysis of age groups, so we know we are hitting the right age group that the campaign targeted. How many people came online and then we did weight losses over time, so we could see how much weight people had lost and how long they were staying and engaging for. And obviously the period of time people stay for has bigger implications for how long they, you know, how they did the behaviour changes and what they are doing” (Commercial partner respondent E - Interview 21).

8.4 Theme 12 - An outcome of partnerships is the partnership itself

Theme 12 is generated from the data attributed to the initial code of outcomes and is – “an outcome of partnerships is the development of the partnership itself”. Figure 47 below illustrates, in the form of a thematic map, how this theme was developed from the first and

second cycle codes. Figure 47 shows that the analysis of data identified 4 first cycle codes – “Value of relationship”; “Partner investment”; “Learning”; and “Outcomes for partner”. These 4 first cycle codes were brought together under the second cycle code of “Outcomes related to a partnership”, and this was used to develop the theme of “An outcome of partnerships is the partnership itself”.

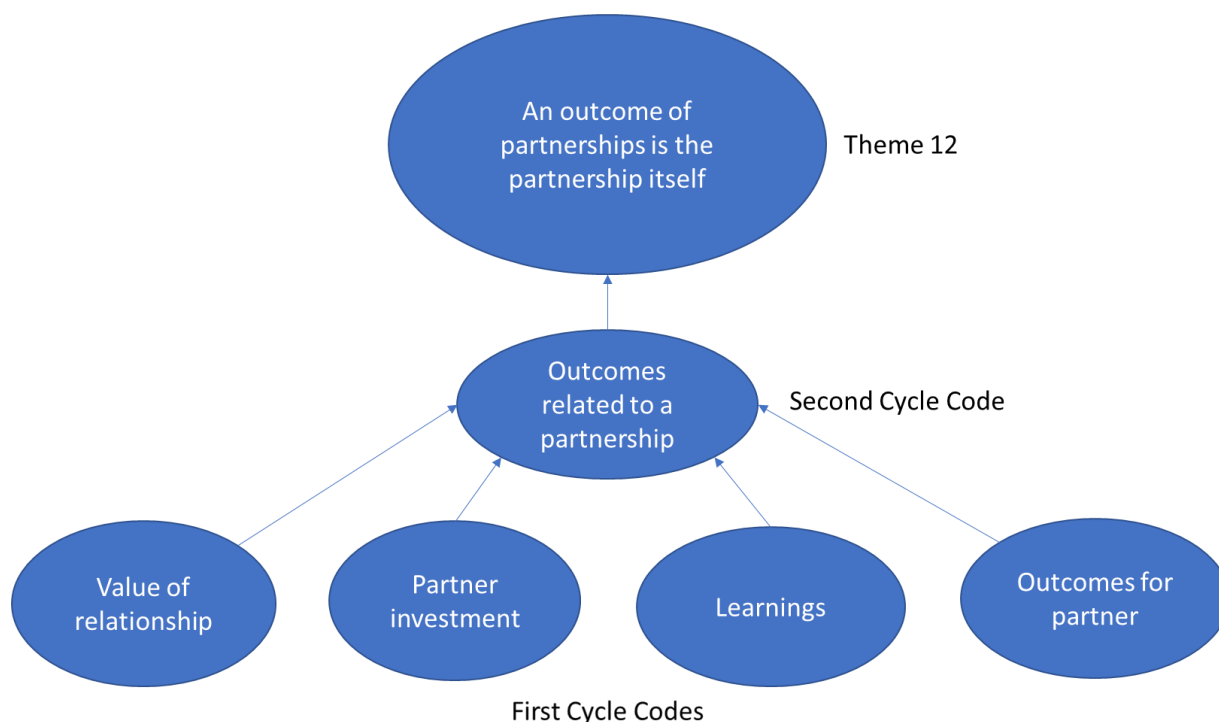


Figure 47: Thematic map – Generation of Theme 12

The findings demonstrate that PHE’s change in approach to focus on the creation and maintenance of long-term strategic partnerships has led to the strategic partnerships themselves being considered an outcome. The quality of the relationship with each strategic partner and the learnings developed about the partnership have become a more important outcome than the estimated value of the activity the partner has delivered to support a campaign. However, with the change in the importance of partnerships, there is still a need to have tangible measures with respect to the relationship with partners and one way of doing this is in terms of partner investment. Learnings are also seen as important outcomes, and these include learnings within each partnership and learnings related to the creation and maintenance of partnerships. PHE, and specifically the Partnerships team, have developed learnings over time since 2009 and continued to learn about partnerships. This way of learning is in line with Mintzberg et al.’s (1999) idea of “logical incrementalism” and highlights a continual process of change with regards to partnerships and social marketing at PHE and DH. This is a form of experiential learning, which is particularly important in the public sector where organisations are increasingly being asked to do more with less, and is an important way of developing corporate

knowledge. One key learning identified was the need to deliver outcomes for the partner linked to their aims and objectives.

8.4.1 Second cycle code – Outcomes related to partnership

Theme 12 “an outcome of partnerships is the partnership itself” – is developed from the second cycle code – “outcomes related to a partnership”. This second cycle code is a pattern code generated from a bringing together of 4 first cycle codes identified from the outcomes data – “value of relationship”; “partner investment”; “learning”; and “outcomes for partner”. Examples from the data that make up each of these 4 first cycle codes are presented in sections 8.4.2 to 8.4.6 below and the full data set can be found in Appendix E.

In brief, the data suggest the *outcomes related to a partnership* include factors relating to *value of relationship* (e.g. the quality, longevity and level of trust in the relationship), the *partner investment* (e.g. the amount of investment put into the partnership by the partner both in terms of money and resource/time), *learnings* (e.g. learnings about the partner, about the development of partnerships and about what works and what doesn’t from a behaviour change perspective), and the need for an *outcome for partner* (e.g. a reciprocal benefit received by the partner).

8.4.2 First cycle code - Value of relationship

The data suggest the value of the relationship with a strategic partner was now seen as a more important outcome than the estimated financial value of the activity a partner carries out. PHE have developed long-term relationships with certain partners and the partnership was now included in those organisations’ marketing strategies, which was seen to be of real value. PHE had attempted to measure the quality of their relationships with partners through surveys, however, the political situation of recent years with 2 general elections and the EU referendum had limited their ability to do this. The longevity of a partnership was also seen as having value for both parties and a measurable outcome that was associated with the level of commitment a partner had to the partnership. This code is evidenced in the following quotations.

- i. Relationship as an outcome - *“I think an outcome that’s hard to talk about is the relationship. But then you do have really good examples like [partner name] where they started off doing that commitment and, six years down the line, they put it in their marketing strategy. You’ve essentially included yourself in an organisation’s marketing plan that would otherwise only ever market [partner name] brands”* (PHE respondent A - Interview 1).

- ii. Quality of relationship as an outcome - *“We tried to measure the quality of the relationship, actually. We developed a survey-based methodology, which in recent years we haven’t used because of the proliferation of elections and the timing of those elections we’ve not really been able to do the kind of survey with partners we want to”* (Partnerships agency respondent C - Interview 11).
- iii. Longevity of relationship as an outcome - *“The measures of success of a partnership is the continued engagement of that partner...I think that you could argue that if a partner continues to work with PHE on a long-term basis, that is a measure of the fact that what PHE is doing is successful in how they work with partners”* (Partnerships agency respondent D - Interview 19).

In addition to the quality of the relationship PHE have with a partner there is also the investment a partner makes to the partnership and this will be presented in the next section.

8.4.3 First cycle code - Partner investment

The data suggest that one potential tangible measure of the outcomes of partnerships is the investment a partner makes into the strategic partnership. This can be in-kind investment of resources, time and brand association or actual financial investment. The level of investment a partner makes is also seen to be linked to their commitment to the partnership. This code is exemplified in the following quotations.

“The thing you can measure is, like, what’s the commitment and investment from the partner? So, if you look at [partner name], there is a lot of mutual investment, like what they put in from a franchise perspective” (PHE respondent A - Interview 1).

“We have identified the top sort of ten, twenty partners who have the most impact, you know, are potentially investing the most amount of time and energy” (PHE respondent E - Interview 16).

8.4.4 First cycle code - Learnings

A further outcome of partnerships highlighted in the data is learnings. PHE believe they have developed learnings related to partnerships in terms of their creation and maintenance, and the development of campaigns. Developing knowledge and understanding of the partner and the partnership are seen as important to the success of partnerships and therefore legitimate outcomes. This code is exemplified in the following quotation.

“I think it's quite legitimate that some of those outcomes are about rate of understanding and learning between the two sides of the partnership” (PHE respondent C - Interview 14).

However, achieving successful strategic partnerships is not straight forward and PHE have learnt that there needs to be mutual benefit in a partnership as opposed to an expectation that a partner will support your agenda. The need for flexibility is also a learning as partners sometimes want to deliver activity at a time that best suits their calendar rather than PHE's. As noted in section 7.2.3 above, the data demonstrate specific learnings for successful partnerships including: letting the partner talk first in the initial meetings; really listening to the partner; co-creating campaign activity; and involving partners in the development of campaigns and campaign tools.

8.4.5 First cycle code – Outcome for partner

The definition of partnerships in social marketing proposed in Chapter 5 demonstrates the need for mutual benefit and the data suggest an outcome of partnerships needs to be the provision of value to the partner. This value can be financial in terms of product/service sales or reputational in terms of being seen in a positive light by their customers/stakeholders. Commercial partners stated an outcome for them is credibility whereas public sector partners highlighted they gained access to resources and brands that they would otherwise have been unable to develop on their own. There is also mutual benefit in working as part of a coalition and the opportunity for networking it provides along with the opportunity to try something new such as a move to digital is also seen as having value. This code is evidenced in the following quotations.

- i. Financial value for the partner - *“PHE joined forces with [partner name] to help adults manage their weight. People taking the How Are You? Quiz from One You who told us they would like to take control of their weight were directed to a unique offer to join a [partner name] programme, either online or in a local group. To date, X [number provide] new members have registered”* (Observation notes).
- ii. Credibility value for the partner - *“I think it gives us credibility, I think that's the primary thing”* (Commercial partner respondent B - Interview 8).
- iii. Resource value for the partner - *“We very much benefit from the resources, the insight, and the development of the campaign that goes on from PHE and the agencies they work with”* (Local authority respondent A - Interview 6).
- iv. Innovation value for the partner - *“One of the things that was really exciting for us for the One You campaign particularly from a [partner name] point of view was the innovation in terms of digital. Because it forced us in a way to develop something*

and to try something that perhaps we wouldn't have done if One You hadn't"
(Commercial partner respondent D - Interview 21).

8.5 Chapter summary

The findings in this study highlight that the outcomes of partnerships in social marketing are difficult to measure because they are seen as being intangible. However, this study proposes definitions of the concept of partnerships, strategic partnerships, and signposting partnerships, which suggest tangible outcomes of partnerships.

The findings in this Chapter combined with the findings from Chapter 6 and 7 demonstrate how partnerships can contribute to national social marketing campaigns. These findings will be discussed in Chapter 9 of this thesis.

Chapter 9

Discussion - How can partnerships contribute to national social marketing campaigns?

9.1 Introduction

The findings relating to the four research questions RQ2, RQ3, RQ4 and RQ5 were presented in Chapters 5 to 8 of this thesis with the purpose being to gain knowledge in these four areas that would generate a greater understanding of the overarching research question, RQ1, which is as follows.

RQ1 - How can partnerships contribute to national social marketing campaigns?

To achieve this, the 13 themes identified in the data were reviewed further in conjunction with the theory identified in the literature review. This followed the Critical Realist commitment to retrodution and abduction. Sections 9.2 to 9.6 in this chapter provide a discussion of the findings in relation to the overarching research question (RQ1) in light of the review of the 13 themes.

9.2 Partnerships can contribute to behaviour change in national social marketing campaigns

As highlighted in Chapter 6 above, the findings from the research demonstrate that PHE believe partnerships can contribute to national social marketing campaigns by providing an opportunity to effect a change in behaviour of the target audience. To achieve this the concept of partnerships needs to be considered as a core component of a macro-level social marketing strategy. This finding suggests a new way of viewing partnerships in social marketing by seeing it as a strategic element of behaviour change. Currently, the social marketing literature refers to partnerships as simply a tactical tool within the marketing mix to be used in the promotion of campaign messages/products. However, this study proposes the idea of partnerships as a core component of social marketing strategy in a macro-level approach to changing behaviour.

Social marketing is being used to tackle increasingly complex social problems and social marketers are being encouraged to take a Marketing Systems approach to behaviour change (Hastings and Domegan, 2018). This requires seeing the social problem as a multi-layered “system” consisting of a network actors that are connected and interact within the system and then to identify and analyse all the actors in the “system” that can have impact on the behaviour of the target audience. This study proposes the idea that partnerships can support changes within and across all levels of the system and ultimately

support a change in the behaviour of the target audience. As such, partnerships is a strategic component of social marketing and, as such, a part of the overall Social Marketing System and this is presented in Figure 48 below.

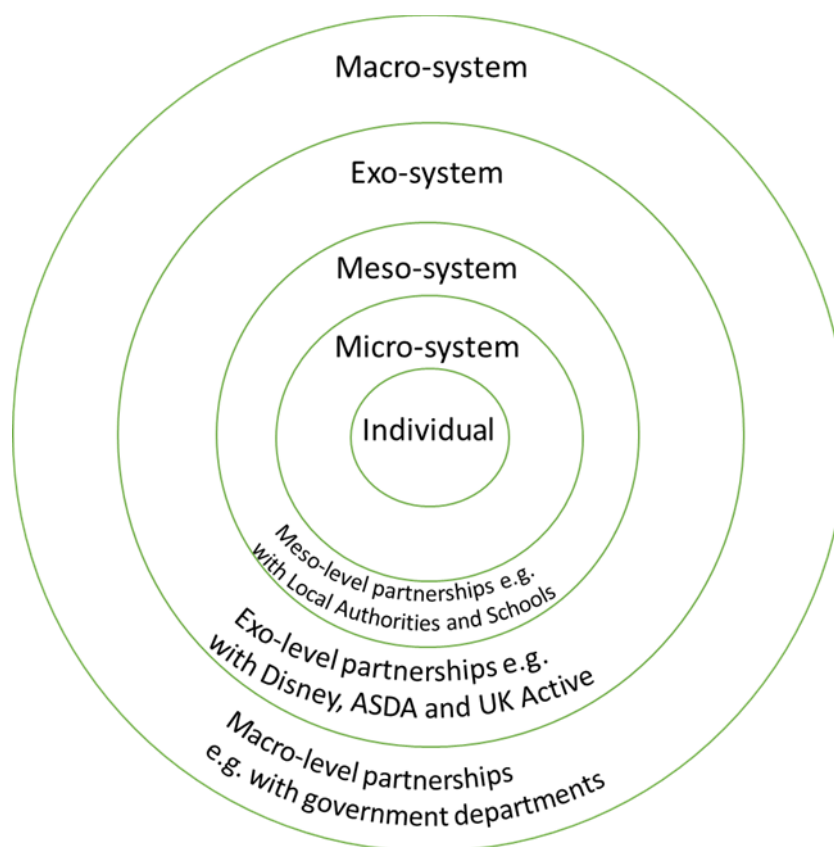


Figure 48: Proposed approach to partnerships as a strategic component of a social marketing system

The proposed model above, developed from the findings in this research, illustrates how partnerships are integral to a macro-level approach to social marketing strategy. Partnerships can be created at national (macro), organisational (exo), and community (meso) levels to support change within the system and in the behaviour of the target audience. At the centre of this approach is the Individual, representing the target audience whose behaviour the strategy ultimately aims to change. This demonstrates the requirement to put the understanding of the target audience at the heart of social marketing strategy. In addition, as highlighted by Theme 5 in this study (see Chapter 6), the Context (e.g. the external environment) of the social problem at all levels (micro, meso, exo and macro) needs to be considered in relation to its impact on the issue and the target behaviour.

The data revealed a change in the reason why PHE create and maintain partnerships in their national social marketing campaigns. When the Change4Life campaign was launched in 2010 partnerships were created to gain access to the partners' channels. This

was to enable Change4Life messages to be communicated to the target audience via these channels. However, PHE now see partnerships as providing the opportunity to effect behaviour change and their rationale for this is a belief that partners have an existing relationship with the target audience, are trusted by the target audience, and are present in the everyday lives of the target audience. PHE do not have this type of relationship with their target audiences and may not have the same level of trust with them that the partners do.

PHE's approach to partnerships in social marketing is notably different to that presented in the social marketing literature. The review of literature for this study identified that partnerships were seen as a part of the tactical social marketing mix, which traditionally consists of the 4 "P"s - Product, Price, Place and Promotion. These are the tactics social marketers use to create interventions as part of their social marketing campaigns/programmes. This study proposes a new approach to partnerships in social marketing that views partnerships as a concept that is a core component of social marketing strategy.

PHE also see the concept of partnerships as providing the opportunity to create "coalitions of change". The aim of creating these coalitions is to change aspects of the marketing system that the social problem exists within to provide a more supportive environment that is conducive to behaviour change. Again this demonstrates a strategic role for partnerships in social marketing.

As noted in Section 1.3 above, the International Social Marketing Association (iSMA) proposed a new definition for social marketing that included recognition of the integration of "partnership insight". However, this research identifies the need for a more strategic role for partnerships and, as such, the following adaption of the iSMA definition is proposed:

"Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good. Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, **partnerships**, and audience insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable."

9.3 Partnerships can contribute to a relational approach in national social marketing campaigns

As identified in Chapter 6 above, PHE believe partnerships provide an opportunity for the development of a relational approach to social marketing. Relationship marketing has been proposed as a theory to be applied in social marketing to support behaviour change with the idea being that social marketers need to focus on building relationships with their target audiences to effect long-term behaviour change (Hastings, 2003). This study proposes that partnerships provide an opportunity to take a relational approach in social marketing by utilising the relationships that partners have with the target audience, particularly where social marketers do not have this relationship. Partners have an existing, ongoing relationship with the target audience that consists of both trust and commitment, which are key components of Relationship Marketing theory (Morgan and Hunt, 1994). In addition, partners can be present at the point of action/purchase to prompt or support a change in behaviour in the target audience. Social marketing practitioners may not have the type of existing relationship with the target audience required to effect behaviour change and, therefore, partnerships offer an opportunity to adopt a relational approach to social marketing strategy.

The data in this study highlight that PHE take a relational approach to their social marketing campaigns and create partnerships to support this. PHE believe that partners have an existing relationship with the target audience onto which they can “piggy-back” onto in order to effect behaviour change. PHE also consider partners to be able to provide the motivation to the target audience to change behaviour and can deliver solutions into the hands of the target audience in the form of products and services, which can support the target audience through the journey of behaviour change. As noted above, trust has been identified as a key factor in Relationship Marketing (Morgan and Hunt, 1994) and is also required in social marketing to gain permission to broach difficult subjects with the target audience and gain the commitment required from them to change behaviour (Duane, 2012). Partnerships can contribute to obtaining the trust required with the target audience to support a change in their behaviour.

The use of a relational approach in social marketing has been proposed in order to achieve an exchange compelling enough to motivate a change in behaviour of the target audience (Hastings, 2003). The findings in this study demonstrate that partnerships can contribute to the exchange in a relational approach to social marketing. This study proposes that instead of looking at exchange in social marketing as a single domain, restricted exchange consisting of a dyadic relationship between the social marketer and the target audience, it can be viewed as a complex exchange between the social

marketer, the partner and the target audience. The data show that this is the relational approach taken by PHE to social marketing, which incorporates a complex exchange between PHE, the partner and the target audience. This can be seen as $A \leftrightarrow B \leftrightarrow C \leftrightarrow A$ where PHE is A, the Partner is B and the target audience is C.

Exchange is at the heart of social marketing and the idea that partnerships can contribute to exchange elevates its importance from a tactical tool, as presented in the literature, to a strategic component in social marketing. The literature review identified a need for the development of insight into the substance of partnerships to support the generation of “a theoretical understanding of what constitutes social marketing partnerships” (Duane and Domegan, 2019 p.170). This finding offers a new way of thinking about partnerships in relation to social marketing strategy.

The findings also identify that the relational approach to social marketing should not be limited to the target audience but needs to be extended to the partnerships themselves. Taking a relational approach to the partnerships in national social marketing campaigns is important as effecting a change of behaviour in the target audience requires strategic partnerships that are characterised as being long-term, requiring extensive, on-going maintenance and are focused on the co-creation of value in campaigns.

9.4 Partnerships can contribute to the creation of value in national social marketing campaigns

As highlighted in Chapter 6 above, the findings in this study identify that PHE believe partnerships can contribute to the creation of value in social marketing strategy. Value is a key concept in marketing and social marketing as for exchange to take place value needs to be created for all parties involved. Value is created from the perceived benefits of something, either tangible benefits, e.g. a physical product, or intangible benefits, e.g. a service or a brand. Partnerships can contribute to the creation of value through the provision of perceived benefits to the social marketing practitioner, the target audience and the partners.

As noted above, social marketers can benefit from the relationship, trust, and credibility that partners have with the target audience. Social marketers can also benefit from the access partners provide to the target audience, particularly at crucial points in the behaviour change journey, e.g. the point of decision making or purchase. This demonstrates how partnerships can contribute to the creation of value in social marketing. Partners can also create value to the target audience through the provision of perceived benefits in the form of products, services, or brands. The literature review in this study identified that social marketers need to create value for their target audiences in order to

effect a change in behaviour (French and Gordon, 2015). However, there was no reference to partnerships contributing to the creation of value. This study proposes a new way of looking at value in social marketing with partnerships being an integral part of the creation and delivery of value to the target audience, the social marketer, and the partner.

The findings in this study highlight that PHE aim to create value for their partners, e.g. through the perceived benefit of an association with a positive health campaign. In return PHE's partners create and deliver value to the target audience, e.g. by providing products or services with perceived benefit to the target audience that support them in making a positive behaviour change. In addition, PHE receive value from their partners, e.g. through the benefit of a direct relationship to the target audience. PHE also create value for and receive value from their target audience, e.g. PHE create an environment that is conducive to behaviour change and supportive of the target audience in an attempt to change their behaviour. This demonstrates that PHE utilise a complex exchange in their national social marketing campaigns, as visualised in Figure 49 below, where value is created by and delivered to all parties.



Figure 49: Proposed model of a complex exchange utilising partnerships as strategy in social marketing

The research shows that partnerships can provide the social marketing practitioner with the value of “cultural relevance” through the partners’ products and brands. In exchange, the social marketing practitioner can provide the partner with the value of “legitimacy” through an association with a positive behaviour change campaign. For example, PHE have a strategic partnership with Disney who provide PHE with cultural relevance through association with the different Disney franchises, e.g. Frozen and Star Wars, to co-create a compelling exchange with the target audience (children aged 5-11 years) for their

campaign. In exchange, PHE provide Disney with the legitimacy of government endorsement as a “healthy” brand through the association with the Change4Life campaign.

Traditionally, social marketers have seen value as being created and delivered through the exchange process and this is referred to as “value in exchange” (French and Gordon, 2015). However, as noted in the literature review in this study, it has been proposed that social marketers need to adapt their view of exchange to consider “value through use” and “value in behaviour” (French and Gordon, 2015), which can be achieved through the “co-creation” of value (Lefebvre, 2012). As noted above, partnerships can be viewed as part of a complex exchange in social marketing and this study proposes that partnerships can contribute to the co-creation value in social marketing and support both value through use and value in behaviour.

The findings show that PHE create and maintain strategic partnerships and work with these strategic partners to co-create social marketing campaigns, e.g. PHE have co-created the “10 Minute Shake-Up” campaign with Disney as part of the Change4Life programme to encourage children to be more physically active. This campaign was co-created over a period of time using the knowledge and experience of both parties. PHE provided their knowledge of social marketing and physical activity, whilst Disney brought their experience of engaging children with fun activities. PHE and Disney co-create value through use and value in behaviour for the children and parents who enjoy the benefit of taking part in the 10 Minute Shake-Up programme and enjoying being physically active.

The literature review in this study identified the need for social marketers to create or co-create value for their target audience in order to effect a change in their behaviour. However, the literature does not specifically reference partnerships as providing the opportunity to create or co-create value. The findings suggest that PHE are doing something different to that identified in the social marketing literature. This study proposes that partnerships can not only contribute to the creation and delivery of value in social marketing but also the co-creation of value between the social marketer, the partner, and the target audience.

The findings also demonstrate that PHE have evolved their thinking in terms of what is the most effective way of co-creating value in social marketing. PHE have developed an “always-on” approach to support the creation and delivery of value in their social marketing campaigns with partnerships as key to this approach. PHE work with partners to co-create and deliver campaign activity all year round to effect a change in behaviour in the target audience. This approach is supported through the building of a coalition of partners where each partner delivers their own co-created campaign activity at times of the year that best suits them and the target audience.

9.5 Partnerships can contribute as a long-term approach to national social marketing campaigns

The findings in this study highlight that PHE understand that partnerships can contribute to a long-term approach in social marketing. PHE are trying to tackle complex social problems on a national scale but are faced with escalating budgetary constraints that make it increasingly difficult to develop the scale of social marketing campaigns required to support and maintain long-term behaviour change. PHE see the concept of partnerships as a potential solution to this problem because partners have more resources to develop and maintain long-term relationships with the target audience and support their behaviour change over time. This is an important finding as the literature review identified that social marketers around the world are facing the same problems as PHE.

PHE have changed their approach to partnerships and now focus on creating long-term strategic partnerships. This has required a change to the way these partnerships are managed and PHE have invested in the development of a Partnerships Team to create and maintain strategic partnerships. PHE appear to be taking a different approach to the management of partnerships in social marketing than that identified in the literature review in this study, which found no reference to maintenance with regards to partnerships. PHE see maintenance as the key to the success of their strategic partnerships and view the creation and maintenance of partnerships as one seamless process with the maintenance starting from the outset. This is because PHE take a long-term approach to partnerships as part of their national social marketing campaigns.

An important element of PHE's approach to partnerships is the focus on maintaining long-term strategic partnerships to effect a change in behaviour of the target audience. This requires a specific partnerships team to manage the creation and maintenance process who not only understand the practice of social marketing but also understand partnerships and have skills in relationship-building, negotiation, communication and understanding partners.

9.6 Partnerships can contribute to outcomes in national social marketing campaigns

The findings in this study highlight that PHE believe partnerships can contribute to outcomes in social marketing. This research proposes that the concept of partnerships is viewed as a core component of social marketing strategy and as such can contribute to the strategic outcomes of national social marketing campaigns. In particular, and as noted

in sections 9.2 to 9.5 above, partnerships can contribute to behavioural outcomes, relational outcomes, exchange outcomes, and value outcomes.

PHE believe that partnerships can contribute to outcomes with relation to changing the behaviour of the target audience, developing a relationship with the target audience, delivering a compelling exchange with the target audience, and creating value with the target audience. In addition, PHE see the partnerships themselves as having outcomes for both themselves and the partner. As such, there are behavioural, relational, exchange and value outcomes between PHE and the partner.

However, the findings also demonstrate the difficulty PHE have in measuring the outcomes of partnerships for two key reasons – (i) the intangible nature of the relational aspects of partnerships; and (ii) the complexity of isolating the effect that individual partnerships have on behaviour change.

Laroche et al. (2004) suggest intangibility is one of two central concepts in marketing, along with perceived risk. The more intangible a product is the more challenging it is to evaluate (Zeithaml, 1981). Laroche et al. (2004, p.374) cite Berry (1980) as defining intangibility as “that which cannot be easily defined, formulated or grasped mentally”. This shows the problem that exists in measuring the outcomes of partnerships as this study found no agreed definition of partnerships in social marketing. The absence of an agreed definition of partnerships has resulted in their intangibility and difficulty to grasp conceptually.

This study proposes the following definition of the concept of partnerships as strategy in social marketing:

Partnerships as strategy is a macro-level approach that views the idea of partnerships as a whole rather than seeing it as simply the individual partnerships.

This study also proposes the following definitions of a strategic partnership and a signposting (tactical) partnership in social marketing:

A strategic partnership in social marketing is a long-term relationship between two organisations with a shared objective to effect behaviour change in a target audience and where a complex exchange takes place and value is co-created to provide mutual benefit for all parties.

A signposting partnership in social marketing is a short-term relationship between two organisations where a restricted exchange takes place that provides value to both parties.

The definition of a strategic partnership focuses on the core aspect of this type of partnership in social marketing – a long-term relationship – and includes the components

of (a) shared objective, (b) exchange, (c) value, (d) co-creation, and (d) mutual benefit. This aspect of strategic partnerships and its components can be defined as follows:

- a) *Long-term relationship – the way in which two or more parties work together to achieve a long-term goal*
- b) *Shared objective – something understood in the same way that two or more parties plan to do*
- c) *Exchange – the transfer of tangible or intangible value between two or more parties*
- d) *Value – the perceived tangible and intangible benefits and costs of something*
- e) *Co-creation – making something new together*
- f) *Mutual benefit – a positive outcome for two or more parties.*

The development of these definitions provides a starting point for the measurement of the outcomes of partnerships by highlighting the tangible aspects of the outcomes of the partnerships themselves and this study proposes partnerships in social marketing be measured in respect of 6 factors as follows:

- i. The quality of the long-term relationship between the parties involved in the partnership
- ii. The achievement of the shared objective of the partnership
- iii. The level of satisfaction with the exchange between the parties in the partnership
- iv. The perceived benefit of the value created by and for each party in the partnership
- v. The level of co-creation between the parties in the partnership
- vi. The achievement of mutual benefit between the parties in the partnership.

PHE also struggle to measure the effect of partnerships on behaviour change and specifically isolating out the impact of partnerships as a whole and the individual partnerships from the overall campaign activity. This study proposes a potential solution in the form of attribution modelling. Attribution models provide frameworks for analysing which channels or touchpoints lead to a customer action, e.g. a sale or a conversion. An attribution model approach can be applied to the touchpoints of a social marketing campaign to help analyse the activities that led to an action by the target audience that had an effect on a change in behaviour. This would help to isolate out the return on investment for each partnership.

9.7 Chapter summary

The overarching research question of this study is - how can partnerships contribute to national social marketing campaigns? The research suggests that the concept of

partnerships when applied strategically at a macro-level in social marketing can contribute to behaviour change through a relational approach where a complex exchange is applied to the co-creation of value between all parties.

This integration of partnerships into macro-level social marketing requires a clear process model for the creation and maintenance of strategic partnerships. The outcomes of strategic partnerships can be intangible but by defining what strategic partnerships are these outcomes can be better understood and made more tangible allowing them to be measured. As social marketers are facing increasingly complex problems the contribution of partnerships could be a major factor in the success of national social marketing campaigns.

Chapter 10

Conclusion

10.1 Introduction

This study offers insight into the contribution of partnerships to national social marketing campaigns developed through the application of thematic analysis to data collected using a case study methodology. This has enabled the development of an in-depth understanding of the approach taken to partnerships by the Marketing team of a national UK organisation, Public Health England (PHE), in their national social marketing campaigns. Specifically, the ethnographic approach taken to the research provided unique access to those people employed in the PHE Marketing Team, and their partners, who have experience and knowledge with regards to the creation and maintenance of partnerships. This supported the development of a greater understanding of the use of partnerships in national social marketing campaigns including their contribution, their definition, the rationale behind why partnerships are created, the process of how partnerships are created and maintained, and the outcomes of partnerships.

The findings evidence that PHE's view of partnerships has evolved. The PHE Marketing team now see partnerships as a concept that is a core component of their social marketing strategy and has the potential to effect a change in behaviour of their target audiences. To support this approach PHE focus on the creation and maintenance of long-term strategic partnerships and look to co-create social marketing campaigns with these partners using the relationship, trust and credibility with the target audience that these partners provide. However, PHE have no agreed definition of partnerships and as such the outcomes of their partnerships are seen as intangible and difficult to measure.

10.2 Background and research questions

This research adopts a thematic analysis method to contribute to the broad area of partnerships in social marketing through case study research into the marketing team at Public Health England (PHE) and the organisations they partner with in their national social marketing campaigns.

This research adopts a critical realist perspective to ask the following questions:

RQ1 - How can partnerships contribute to national social marketing campaigns?

RQ2 - How might partnerships be defined by an executive government agency in their national social marketing campaigns?

RQ3 - Why are partnerships created and maintained to support national social marketing campaigns?

RQ4 - How are partnerships created and maintained to support national social marketing campaigns?

RQ5 - What are the outcomes of partnerships in national social marketing campaigns?

This chapter continues with a summary discussion of the findings. It then outlines the contributions to knowledge and practice made by this study, before considering limitations of the research and reflecting on connections to wider debates.

10.3 Summary and discussion of findings

In relation to the overarching question in this study - How can partnerships contribute to national social marketing campaigns? - the findings reveal that the PHE Marketing team's thinking with regards to partnerships has evolved. In 2009 partnerships were seen as individual entities and were used as a promotional tactic to support the communication of PHE's national social marketing campaigns. Now PHE view partnerships as a concept that is a strategic component of their macro-level approach to social marketing, although they still use individual partnerships for tactical purposes.

The research demonstrates that the PHE Marketing team are trying to tackle complex social problems, such as obesity, at a national level and apply the concept of partnerships as strategy to effect a positive change in the behaviour of the target audiences of their national social marketing campaigns. This suggests there are certain conditions for seeing partnerships as strategy in social marketing and these consist of - (i) a national population approach, (ii) a complex social problem, and (iii) a requirement for long-term behaviour change. PHE view partnerships as a marketing tactic when they are looking to increase the reach and frequency of a campaign message to the target audience. This suggests the conditions for viewing partnerships as tactics consist of: (i) the communication of a consistent message, (ii) a simple, short-term problem and (iii) a requirement for raised awareness or increased understanding.

PHE's thinking in regard to partnerships as a concept has evolved over time and there is now a belief that partnerships can provide a significant contribution to PHE's national social marketing campaigns. This study identified five key areas where partnerships can contribute to national social marketing campaigns when viewed as a core component of social marketing strategy and these support a greater understanding of the overarching

research question (RQ1). These five areas were presented and discussed in Chapter 9 above and are as follows:

- i. Partnerships can contribute to behaviour change in national social marketing campaigns through a strategic approach.
- ii. Partnerships can contribute to a relational approach in national social marketing campaigns by leveraging the existing relationship and trust partners have with the target audience.
- iii. Partnerships can contribute to the creation of value for the target audience, the practitioner and the partner in national social marketing campaigns.
- iv. Partnerships can contribute as a long-term (12 months or more) approach to national social marketing campaigns.
- v. Partnerships can contribute to both campaign and partnership outcomes in national social marketing campaigns.

10.4 Contribution of this research to knowledge and practice

This research adopts a Critical Realist philosophy and as such believes all findings are developed from data collected at the Empirical level and not the Actual level. It is understood that all research has the potential to be fallible but there is a belief that the findings in this study have validity. As such, the research objectives of this study were to generate a greater understanding of the use of partnerships in national social marketing campaigns and, through this understanding, develop insight into the use of partnerships that can have impact on knowledge and practice in social marketing.

At the time of completing this thesis the future of PHE looked uncertain as the UK Government had announced a proposal to disband PHE and replace it with a new body, the National Institute for Health Protection. The potential closure of PHE could result in a loss of the corporate knowledge it has developed over time. This reinforces the importance of the understanding of partnerships in national social marketing campaigns generated by this study, which otherwise may have been lost. The contribution of this study to knowledge and practice will be presented and discussed in sections 10.4.1 and 10.4.2 of this chapter.

10.4.1 Knowledge

As noted previously, social marketing is not a theory in and of itself but instead provides a framework for the application of theory. As such, this research contributes to social marketing thinking in the form of the development of insight that adds to knowledge and this is provided in the following areas.

10.4.1.1 Partnerships as strategy in social marketing

This study proposes a new way of thinking of partnerships in social marketing.

Partnerships can be viewed holistically as a strategic concept in social marketing rather than seeing partnerships as individual entities. As a concept, partnerships can play a strategic role in the long-term development and delivery of solutions to tackle complex social problems at a national level. This study puts forward the idea that partnerships are a core component of social marketing strategy and provide the opportunity to effect a change in behaviour of the target audience. The social marketing literature currently positions partnerships as part of the intervention mix and as such a marketing tactic that is only considered once a campaign has been developed. This study proposes the concept of partnerships as strategy in social marketing and, as such, partnerships need to be considered at the start of any campaign development. The idea of partnerships as strategy in social marketing provides a potential contribution to knowledge with regards to national social marketing campaigns that adopt a macro-level approach to tackling a complex social problem with the aim of effecting long-term behaviour change. This is reflected in the proposed amendment of the International Social Marketing Association's definition of social marketing as outlined below:

“Social marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater social good. Social marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, **partnerships**, and audience insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable.”

10.4.1.2 Definition of partnerships in social marketing

This study proposes the concept of partnerships be defined as follows:

Partnerships as strategy is a macro-level approach that views the idea of partnerships as a whole rather than seeing it as simply the individual partnerships.

Adopting this strategic approach to partnerships in social marketing requires a new way of thinking about a partnership in social marketing. The literature review in this study identified the absence of an agreed definition of a partnership in social marketing and so an important contribution to knowledge of this research is to propose a definition that fits the concept of partnerships as strategy. Two definitions are proposed – one for strategic partnerships and one for signposting (or tactical) partnerships and these are as follows:

A strategic partnership in social marketing is a long-term relationship between two organisations with a shared objective to effect behaviour change in a target

audience and where a complex exchange takes place and value is co-created to provide mutual benefit for all parties.

A signposting partnership in social marketing is a short-term relationship between two organisations where a restricted exchange takes place that provides value to both parties.

10.4.1.3 Partnerships and a relational approach in social marketing

This study proposes that embracing the concept of partnerships as strategy in social marketing provides an opportunity to adopt a relational approach to behaviour change. Relationship Marketing has been put forward as a theory that could be used in social marketing to support behaviour change (Hastings, 2003). This study proposes that partnerships as strategy is an important consideration when applying Relationship Marketing in social marketing. Morgan and Hunt (1994) identified the two key moderating variables of “Trust” and “Commitment” as being essential in Relationship Marketing and these have also been proposed as essential in social marketing. Partnerships provides an opportunity to adopt this approach because partners have existing relationships with their customers/clients, have credibility with them and are trusted by them. Social marketing practitioners may not have a relationship with their target audience and so might not be able to engender the trust and commitment required to motivate a change in behaviour. Partnerships provides social marketers with an opportunity to leverage the relationships that partners have with the target audience to gain their trust and commitment.

Integral to the adoption of the concept of partnerships as strategy to support Relationship Marketing in social marketing is the need to take a relational approach to the creation and maintenance of the individual partnerships themselves. Duane (2012) promoted the use of a relational approach to partnerships in social marketing and developed a Social Marketing Partnerships model. The findings in this study of PHE provide insight into their relational approach to strategic partnerships and identifies a number of factors that appear to be additional to those in Duane’s (2012) model. For example, this study of PHE identified the need for a “shared objective” to effect behaviour change as an antecedent of partnerships in social marketing. Duane’s (2012) model identifies “shared values” and this can be supported by a “shared objective”. In addition, this study proposes an outcome of strategic partnerships in social marketing is the “co-creation of value”. Duane’s (2012) model identifies “cooperation” as an outcome and this can be evidenced by the “co-creation of value”. Finally, “uncertainty” was highlighted in this study as an antecedent of partnerships in social marketing. Duane’s (2012) model identified “tension” as a potential outcome of partnerships in social marketing, where tension was defined as the “manifestation of negative outcomes in the relationship” (Duane, (2012, p.272), and this replaced “uncertainty” that was proposed in Morgan and Hunt’s original model. This study

of PHE demonstrates that “uncertainty” can impact on partnerships in social marketing but is negated if trust exists between the two partners. These findings have potential to contribute to the knowledge of partnerships created by Duane’s model.

10.4.1.4 Partnerships and exchange in social marketing

The concept of partnerships as strategy in social marketing and the opportunity partnerships provide in utilising a relational approach to effect behaviour change suggests a new way of thinking about the exchange in social marketing. This relational approach involving strategic partnerships consists of a complex exchange between the social marketing practitioner, the strategic partner, and the target audience. This study proposes that when viewing partnerships as strategy it is the strategic partner who has the existing relationship with the target audience and therefore the partner creates and delivers value to the target audience of sufficient perceived value as to motivate a change in behaviour. This idea has the potential to contribute to knowledge of the exchange in social marketing by identifying the concept of partnerships as being key to developing a compelling enough exchange in social marketing to effect behaviour change.

10.4.2 Practice

Undertaking case study research provides the opportunity to generate an in-depth understanding of a specific case that can have impact on practice of other cases. This study of the PHE Marketing team has generated knowledge of their practice with regards to the use of partnerships in national social marketing campaigns that can support the work of social marketing practitioners and this contribution to practice is presented in the following sections.

10.4.2.1 Selection criteria for strategic partnerships

This study proposes criteria for the selection of prospective strategic partnerships. This criteria is visualised in Figure 50 below, which shows that the target audience are at the centre of the selection process. It then focuses on identifying and selecting prospective strategic partners who have actual reach to the target audience, true relevance to the target audience, are trusted by the target audience, and have impact on the target audience.

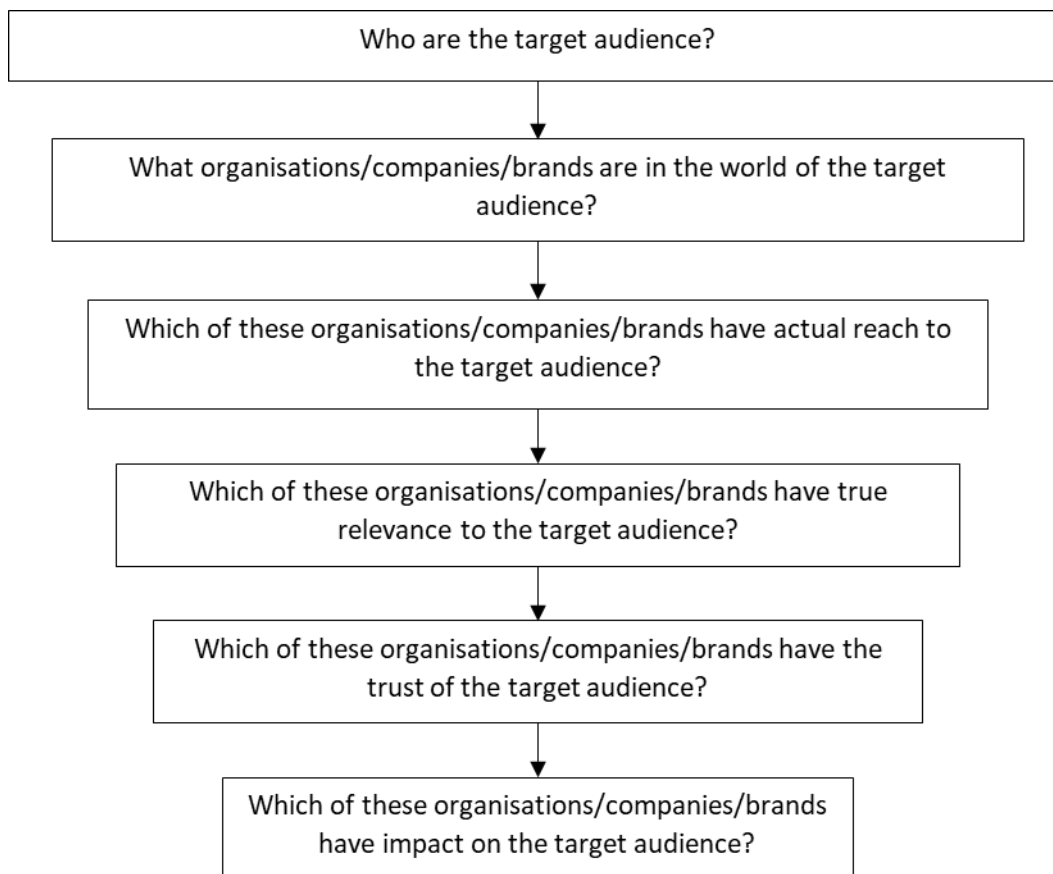


Figure 50: Model of criteria for selection of prospective strategic partners in social marketing

These criteria, whilst developed from research on the PHE Marketing team, have the potential to support social marketing practitioners looking to identify potential long-term strategic partners who have the potential to effect a change in behaviour of the target audience.

10.4.2.2 Process for the creation and maintenance of strategic partnerships in social marketing

Following on from the selection criteria for prospective strategic partners, this study goes on to propose a process for the creation and maintenance of strategic partnerships, with both commercial organisations and public sector organisations, in social marketing. This is presented in Figure 51 below and again shows the need to put the target audience at the heart of the process by creating a touchpoint map based on the selection criteria highlighted above.

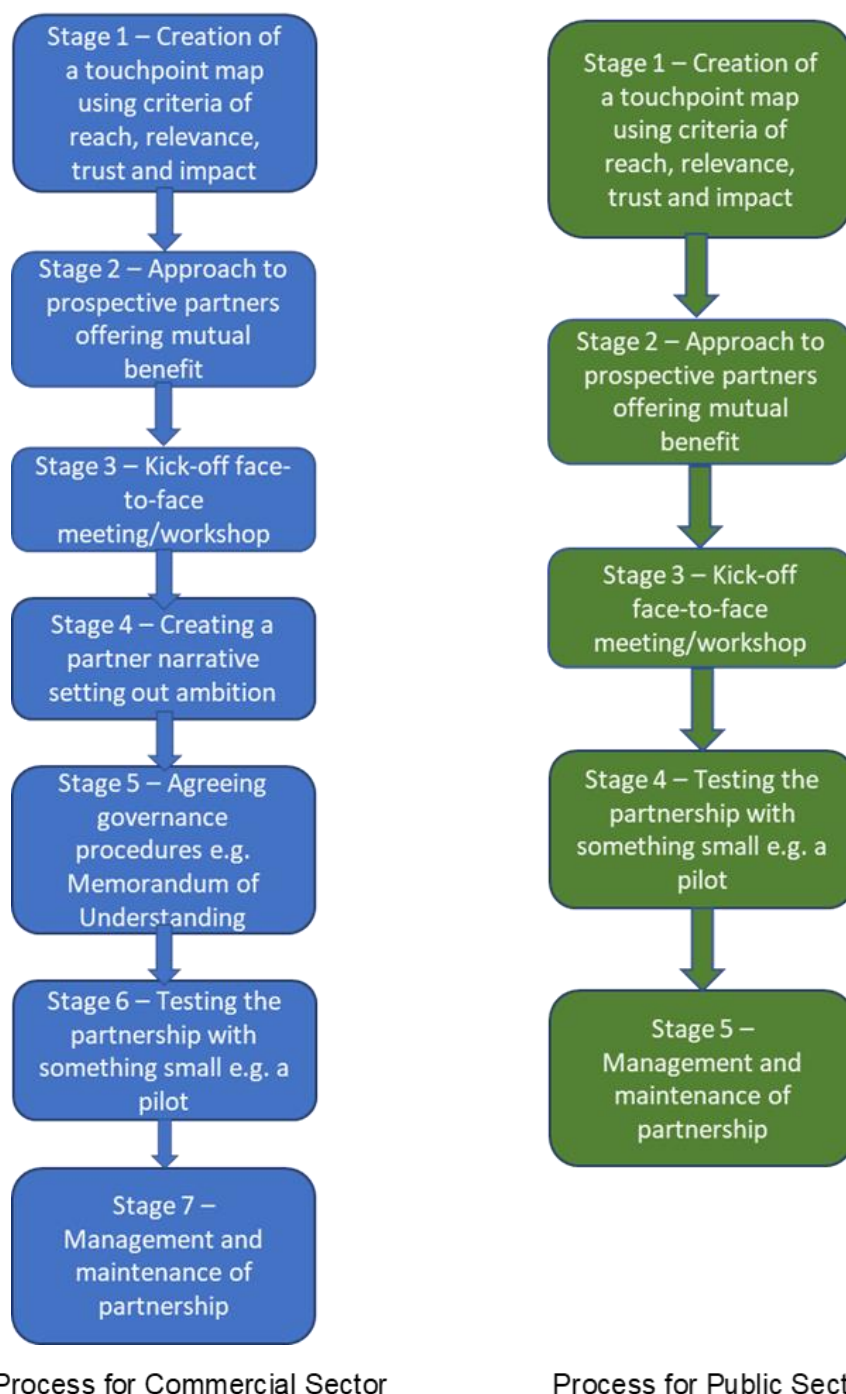


Figure 51: Process for the creation and maintenance of strategic partnerships

This process has potential to be of benefit to social marketing practitioners looking to create and maintain long-term strategic partnerships with organisations in the commercial sector or in the public sector.

10.4.2.3 Coalitions for change

This study proposes the development of “coalitions for change” to support social marketing practitioners in tackling complex social problems. The suggestion here is that the whole (the coalition) can have a greater effect on the target audience than the sum of its individual parts (each partnership). This approach extends the idea of source credibility

by having many voices giving the same message to the target audience. Having a coalition of partners focused on a shared objective of behaviour change provides greater encouragement for the target audience to listen, understand and take action. A “coalition for change” involves a cooperating/collaborating strategy where the social marketing practitioner works with all the coalition partners in the exchange of information, developing activities and sharing resources to effect behaviour change.

10.4.2.4 Always-on campaigns

This study proposes an “always-on” approach to social marketing campaigns supported by partnerships as a way of effecting long-term behaviour change as opposed to having short “spikes” of campaign activity. Partnerships are key to this “always-on” approach as partners are in constant communication with their target audience and can develop and deliver campaign activity at all times throughout the year, particularly through their social media and digital platforms, which the target audience can access when they are ready to start their behaviour change journey. It is believed that developing “always-on” campaigns through partnerships will provide a greater opportunity for social marketing practitioners to achieve long-term behaviour change.

10.4.2.5 Measuring outcomes of partnerships

This study demonstrates the difficulties faced by social marketing practitioners in measuring the outcomes of partnerships. However, by proposing definitions of the concept of partnerships, strategic partnerships and tactical partnerships, tangible outcomes of the individual partnerships are proposed and these include:

- i. the quality of the relationship between the partners
- ii. the achievement of the shared objective
- iii. the acceptance of the exchange
- iv. the perception of the value created between the partners
- v. the creation of mutual benefit.

In addition, this study proposes that social marketing practitioners consider attribution modelling as a potential tool to separate out and measure the impact of partnerships, along with other campaign elements, in changing the behaviour of a target audience.

10.5 Limitations of this study

This research adopts a Critical Realist philosophy and views all data collected as being observed at the Empirical level and not the Actual level. As such it is understood that all research has limitations and that the findings in this study are fallible. Adopting a Critical

Realist philosophy has limitations as it is a new and evolving approach to social research that has relatively few empirically tested examples of best practice.

Case study research has limitations and in this study all data was collected from a single case whose view of social marketing and partnerships was historically inherited. Whilst it is believed that this enabled a unique and in-depth investigation into the selected case, this case does not represent a “sample” and the findings are not intended for generalisation. Instead the aim is to develop knowledge about this one case that can then undergo further empirical testing. The limitation of studying a single case was mitigated by the collection of data over a period of four years during which time five national social marketing campaigns involving partnerships were observed. In addition, it was not intended to compare this case with other cases, although by developing insight into this one case may help in understanding other cases.

Being a researcher in the field provides limitations particularly regarding researcher bias. Critical realists accept that researcher bias exists and there is a requirement for the researcher to take a reflexive approach to the research. However, this requires a necessity for the researcher to adopt reflexivity throughout the research process. This was particularly important during the data collection and analysis process. Using thematic analysis to analyse the data has limitations as it relies on the researcher to generate and select the codes being given to the data.

The choice of research methods also brings limitations. The use of face-to-face semi-structured interviews involved experiences recounted by participants that were socially constructed and produced self-reported data that may not represent a full understanding of the phenomena under investigation. The use of purposive sampling to identify the interview participants can bring limitations as it excluded participants who were not deemed to have knowledge or experience of partnerships. A sample of twenty-one people were interviewed, which is appropriate in a study of this kind and a manageable number given the time constraints but means that a variance in the findings can be introduced by one or two participants. In addition, some interview participants were known to the researcher and this can have an impact, both positive and negative, on the responses being provided. On the positive side the researcher did not have to establish a relationship or build rapport with these participants and was not perceived by them as an “outsider”. On the negative side these interviewees may have adopted a professional stance and been reluctant to provide “authentic accounts” if they did not trust the researcher to protect their anonymity. To handle this the interviews were conducted away from the respondents places of work and the protection of the respondents data and anonymity was stressed before, during and after the interviews.

The use of documents as evidence can present limitations and the documents used in this study were written by PHE (or the DH before them) for a specific purpose and for a particular audience. As such, the data collected from them has to be viewed as being influenced by this process. The use of observation as a research method has limitations as it relies on the skills of the researcher and presents a further opportunity for researcher bias.

Having three research methods reduced the impact of the limitations of the individual research methods and retrodution was undertaken throughout the data collection analysis to identify where there was agreement and discrepancy. In addition, triangulation was followed in an attempt to challenge and corroborate the findings.

10.6 Implications for future research and connections to wider debate

Investigating the use of partnerships in national social marketing campaigns has generated a greater understanding of why partnerships are created, how partnerships are created and maintained, and the outcomes of partnerships. The findings in this study have prompted further ideas and questions that this thesis does not have the scope to address, but which could form the basis of future academic inquiry.

The study proposes the concept of partnerships as strategy in social marketing, based on research with the PHE Marketing team. This suggests a new way of thinking in social marketing and, as such, requires further research across different settings to see whether this idea holds true. In addition, this study proposes that partnerships as strategy provides the opportunity to effect a change in behaviour in the target audience and this requires further academic inquiry to ascertain if partnerships is effective in generating behaviour change and, if it is, what is the best way to achieve this.

The three definitions proposed in this study (for (i) partnerships as strategy, (ii) strategic partnerships, and (iii) signposting (tactical) partnerships) need to be considered across different social marketing settings to test their relevance and identify the conditions for when they are appropriate and when they are not. Similarly, the two models developed in this study (for (i) the selection of prospective strategic partners and (ii) the process of creating and maintaining strategic partnerships) both require further testing to see if they prove successful across different social marketing programmes.

This study identified the difficulties in measuring the outcomes of partnerships. Further research needs to be conducted to identify clear Partner Value Metrics and to ascertain the ability of Attribution Modelling to support the measurement of the outcomes of partnerships.

With regards to the wider academic debate in social marketing, the literature review in this study identified the importance of Exchange Theory and the potential of Relationship Marketing in supporting effective behaviour change. This research proposes the concept of partnerships as strategy in social marketing and there is an opportunity for partnerships to play a part in both the development of a compelling exchange and the adoption of a relational approach. Future research could look at what the role of strategic partnerships is in these two areas with regards to social marketing.

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Appendices

Appendix A - Information



Date_____

Researcher's Name: David Shaw

Supervisors: Dr Fiona Harris and Dr Haider Ali

Title of Project – An investigation into the use of partnerships in national social marketing campaigns in England

Research Information Sheet

What is the aim of this research?

You are being invited to take part in a doctoral research project. This project is part of a PhD at the Open University and is investigating the use of partnerships in social marketing campaigns. More specifically, the research is focusing on the campaigns developed by Public Health England (PHE), including One You, Change4Life and Stoptober, and how they work with partners within these campaigns. The aim of the project is to gain a greater understanding of how partnerships are created and maintained to support the public health campaigns being studied. It is hoped that the research will be of benefit to people working in public health and social marketing.

What is involved?

The researcher is interested in finding out the experiences of people involved in partnerships in PHE social marketing campaigns and to achieve this will be conducting face-to-face interviews with key people involved in the partnerships. This includes people in the PHE marketing team and also people employed by the partner organisations. Interviews will involve a researcher talking to you for about one hour. The interview will be recorded and then transcribed to ensure that everything you tell the researcher is correctly documented. Notes will also be taken about what is said during the interview. The researcher will work around you to arrange a venue and time convenient to you for this interview.

What will I be asked?

The main question guiding this research is: how can the creation and maintenance of long-term partnerships support national social marketing campaigns aimed at improving public health in England?

Do I have to take part?

No, your participation is voluntary. If you do decide to take part, you will be given this information sheet to keep and you will be asked to sign a consent form. Even if you say yes to begin with, you are free to withdraw at any time up to the submission of the final report and you will also have the opportunity to have any supplied data destroyed on request. Participants will be provided with a transcript of the interview to ensure they are happy it is an accurate record of the interview.

How will my data be protected?

No personal information will be passed on to anyone outside the doctoral research team. This includes staff from PHE. All the information that is collected from you during this research will be kept securely and any identifying material, such as names and addresses, will be removed in order to safeguard your personal and professional anonymity. The findings of this study will be reported to the Open University Business School and written up in a report that will form part of the doctoral thesis. The thesis will be generally available in the public domain. Participants will be able to view any data held about themselves at any time. Any personal data recorded such as contact details will be destroyed once the study is completed.

It is not envisaged that there will be any risks associated with participation in the research and the researcher will take every safeguard to protect the anonymity of participants and to guard participants from undesirable consequences.

What if I have other questions?

If you have questions the doctoral research team would be happy to answer them. The principal researcher is David Shaw and his contact details are david.shaw@open.ac.uk and 07795 597765. The main supervisor of the project is Dr Fiona Harris at the Open University fiona.harris@open.ac.uk

Appendix B – Letter of introduction

Subject: Re: PhD research

Hello

I am a part-time doctoral researcher at the Open University in Milton Keynes, in the third year of my PhD. My PhD research is an investigation into the use of partnerships in national social marketing campaigns. As part of this research I am planning to interview people who have experience of partnerships in this area.

I would really appreciate the opportunity to interview yourself. I have attached further information on the research project and also a consent form. The interview would take approximately 1 hour and I would like to record it to enable for a transcript of the interview to be produced. All data from the interview would be confidential and anonymised.

Fridays are my PhD days so if possible I'd like to conduct the interview then. Would you be free on either 26 May or 9 June? If so let me know the best time for you. If those days are no good could you provide a couple of options.

Many thanks for your help.

David Shaw

Appendix C – Consent Form

Department for Strategy and Marketing

Consent form for persons participating in a research project

Study Title - An investigation into the use of partnerships in national social marketing campaigns

Name of research participant: _____

Name of researcher: David Shaw (The Open University Business School), **supervised by:** Dr Fiona Harris and Dr Haider Ali (The Open University Business School) _____

You are being asked to participate in a doctoral research project about the use of partnerships in social marketing campaigns. Please read this form and ask any questions that you may have before the interview proceeds.

1. I consent to participate in this project, the details of which have been explained to me, and I have been provided with a written statement in plain language to keep.
2. I understand that my participation will involve a face-to-face interview and I agree that the researcher may use the results as described in the plain language statement.
3. I acknowledge that:
 - a. My participation is voluntary, that I can choose not to participate in all or part of the interview, and that I am free to withdraw at any stage of the interview without explanation or being penalised or disadvantaged in anyway. I understand that any or all of the information that I provide will be destroyed if I so request at any time up to the submission of the final report;
 - b. The project is for the purpose of research;
 - c. My personal details will be protected and the data I provide will be anonymised.
 - d. All data from me will be referred to by a pseudonym in any publications arising from the research, e.g. Interviewee 1;
 - e. I have been informed that with my consent the data generated will be stored securely and will be destroyed at the end of the PhD project;

I consent to this **interview** being audio-taped

☐ **yes** ☐ **no**
(please tick)

Participant signature: _____

Date: _____

CONTACT DETAILS FOR DAVID SHAW – DAVID.SHAW@OPEN.AC.UK

Appendix D – Discussion guide for the semi-structured interviews

Face to face interview discussion guide

- Q1. Which PHE social marketing campaigns have you been involved in and over what period of time?
- Q2. Why do PHE create partnerships?
- Q3. How do PHE create a new partnership? What is the process?
- Q4. What are the benefits to PHE of partnerships?
- Q5. What are the benefits to the partner?
- Q6. How do PHE manage a partnership?
- Q7. What are the outcomes of the partnerships?
- Q8. In the context of PHE social marketing campaigns how do you define a partnership?
- Q9. In the context of PHE social marketing programmes are there different types of partnership? If yes what are they?
- Q10. How do PHE select a prospective partner?
- Q11. How do PHE agree the aims of a partnership? Are these shared aims with the partner? How are they agreed? Internally? With the partner?
- Q12. How do PHE develop and maintain trust with partners?
- Q13. How do PHE manage risk?
- Q14. What is the governance process around creating the partnerships?
- Q15. How do PHE manage communications with partners?
- Q16. Where do partnerships fit within the overall social marketing approach at PHE?
- Q17. Why do PHE create a coalition of partners?
- Q18. How can the environment PHE operate in impact on the creation of partnerships?
- Q19. How do PHE manage uncertainty?
- Q20. Why do PHE maintain long-term partnerships?
- Q21. What do you understand by a partner-led campaign? Can you give an example?
- Q22. How do PHE/you see the future with regards to partnerships?

Appendix E – Data coded to the initial codes

Antecedents data

Document Name	Findings – Rationale for Partnerships
Change4Life Marketing Strategy 2009 (DH)	<p><i>“to gain access to the partners’ channels”</i></p> <p><i>“to give campaign scale and reach”</i></p> <p><i>“DH cannot tackle childhood obesity on their own”</i></p> <p><i>“influence the target audiences in ways DH cannot”</i></p> <p><i>“provide a consistency of messaging to the target audience”</i></p> <p><i>“distribute Change4Life materials to the target audience”</i></p> <p><i>“create a cross-societal movement to tackle obesity”</i></p> <p><i>“support a shift in social norms in the long-term”</i></p>
Change4Life One Year On 2010 (DH)	<p><i>“to access partners channels”</i></p> <p><i>“to provide a consistent message about obesity”</i></p> <p><i>“to have messages delivered by voices trusted by the target audience”</i></p> <p><i>“to provide access to the relationship’s partners have with the public”</i></p> <p><i>“to provide messaging close to the point of purchase and consumption”</i></p> <p><i>“to develop the brand value of Change4Life”</i></p> <p><i>“to inspire a societal movement”</i></p>
Change4Life 3-year Marketing Strategy 2011-2014 (DH)	<p><i>“to attract additional non-government activity to the Change4Life programme”</i></p>
Changing Behaviour, Improving Outcomes – a new social	<p><i>“DH can only achieve its goals by working in partnership with others”</i></p> <p><i>“partners can provide support and incentives to make behaviour change easier”</i></p>

marketing strategy for public health 2011 (DH)	<p><i>"brands have trusting relationships with the target audiences and are closer to the behaviours DH want to influence"</i></p> <p><i>"as a societal movement Change4Life can only fulfil its goals by working in partnership with others"</i></p> <p><i>"to have many voices repeating the same messages in the same way but adapted to the needs of the specific target audiences"</i></p> <p><i>"success will depend on attracting others, including the voluntary sector and industry, to support the programmes"</i></p>
PHE Marketing Strategy 2014-17	<p><i>"to engage with the organisations who have the opportunity to be the biggest influence on the health of the target audiences"</i></p> <p><i>"to increase the depth, quality and impact of the marketing programmes"</i></p>
PHE Marketing Strategy 2014-17 one year on	<p><i>"to increase the reach and impact of PHE's marketing programmes"</i></p> <p><i>"to amplify messaging"</i></p> <p><i>"to drive participation and successful completion"</i></p> <p><i>"to cement social norming"</i></p> <p><i>"to localise national messaging"</i></p> <p><i>"to provide another layer of support and motivation for the target audience"</i></p> <p><i>"to provide opportunity to deliver local behaviour change programmes"</i></p> <p><i>"to deliver activity all year round"</i></p>
PHE Social Marketing Strategy 2017 to 2020	<p><i>"target audience may trust and engage with partners more than PHE"</i></p> <p><i>"organisations have an existing, trusting relationship with the target audiences"</i></p> <p><i>"partners can reach the target audience and influence their behaviours in ways PHE cannot"</i></p> <p><i>"to customise and share PHE content"</i></p> <p><i>"to provide the right environment to support people in changing behaviour"</i></p>

PHE respondent G	<i>"two major reasons. One is the way that you influence people and their health is via the real brands that they reach and touch every day in their lives, so hearing a message and an offer from [partner name] about healthy eating may well be more motivating than hearing it from a campaign or even from a government funded body. So, the criticality of the messenger and the contextual opportunities to talk to people about health and lifestyle is critically important" (Interview 18).</i>
PHE respondent D	<i>"a conversation with someone at the right time"</i> <i>"then hand-hold that person that you are actually having that marketing conversation and pass them to somewhere where they can actually do the thing you want them to do, that's very powerful"</i> <i>"so you're not just delivering messages. You're saying, and here's the next step where you can take action" (Interview 15)</i>
Partnerships agency respondent B	<i>"partners were able to intermediate difficult conversations with an end audience"</i> <i>"being meaningful to consumers by, sort of, reframing more tricky topics within a branded or a local context, and the ability to deliver behaviour change by being present when it matters" (Interview 5)</i>
Partnerships agency respondent B	<i>"it's about leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and credibility that they can provide, to interpret a behaviour change message in their own words through points in time that are highly relevant to getting people to take action"</i> <i>"brands have a more everyday continuous welcome relationship with our end audience, and by inserting our message into that, we're able to, sort of, walk side by side with our consumers as opposed to interrupting them on an infrequent basis. So, we can have a longer, more meaningful relationship as opposed to a more, kind of interruptive, slightly adult-to-child relationship, which is where I think sometimes advertising goes" (Interview 5)</i>
PHE respondent E	<i>"you can't do it all yourself and that it takes multiple prompts to get people to change their behaviour, so, you know, we are never going to be big enough to, to do that by ourselves and actually we don't necessarily have the ability in government to actually reach</i>

	<i>out to people at the point where they might be thinking about changing their behaviour” (Interview 16)</i>
Partnerships agency respondent C	<p><i>“recognition that actually if you are going to change the behaviour of people ... that you actually have to be very close to the point of purchase, consumption”</i></p> <p><i>“that’s where partners are uniquely placed. They are present at those points of purchase, consumption, influence, behaviour change to actually support people, to nudge them, to support them in changing that behaviour in their community, in their workplace, in their school, you know, at their hospital bed, where we can’t be” (Interview 11)</i></p>
PHE respondent E	<i>“in the case of Change4Life you might talk to a retailer because they are able to prompt a consumer to make a healthier choice at point of sale. If you’re wanting to help someone quit smoking, you’d talk to a pharmacy” (Interview 16)</i>
Commercial partner respondent B	<p><i>“they [PHE] don’t have outlets”</i></p> <p><i>“we’re on every high street, we’ve got long opening hours, we’ve got expert pharmacists who can help support”</i></p> <p><i>“partnerships with a product, you know, if you’re talking about staying fit and healthy, monitoring blood pressure, they need to be able to drive consumers to what they would consider to be a trusted brand with products that would do the job and do it properly” (Interview 8)</i></p>
Commercial partner respondent C	<p><i>“we’ve got access to a lot of people they [PHE] want to talk to. And it can be done in a way when it’s linked to people’s shopping and therefore their diet, that it seems appropriate for both sides, and most importantly, it feels appropriate for our shoppers who want to engage, that there’s somebody talking to them about health”</i></p> <p><i>“I think we are a good conduit in a day-to-day situation rather than it being a health message done through a public broadcaster or a leaflet that no one reads” (Interview 9)</i></p>
Local authority respondent A	<i>“we, as a local authority, and my partners will deliver lots of events. We have lots of those kind of front-line things like school nurses, health visitors, links with schools, links with hospitals and services”</i>

	<p><i>“we can perhaps have a little bit more of a personal interaction than perhaps PHE could at a marketing level looking at adverts, outdoor advertising, TV advertising. I guess there’s also the element where we can localise it to make it feel more relevant to the person”</i></p> <p>(Interview 6)</p>
Local authority respondent B	<p><i>“I’m taking them [PHE campaign resources] out to our children’s centres, our libraries, our community centres, our youth clubs, our adventure playgrounds, our housing offices. I share them with our health visitors that sit in the next building from ours and they give them out to families that they’re visiting. So, I guess certainly from a local understanding point of view and our wellbeing service, located in GP surgeries, they work from pharmacies, they work in children’s centres as well, community centres, I can give access to them and they can go and, kind of, take them out there”</i></p> <p><i>“what we can do locally as well is talk about the actual services available locally. So, for example, Stoptober, we can use the national materials, we can also tie that in with our smoking cessation service, the two of them work, you know, really well together”</i></p> <p><i>“the Council employs 3,000 people and they touch our residents’ lives on a daily basis, you know, through housing offices, benefits offices, people that run libraries, our health visitors, all these different people they’re out there. And a lot of them have got the trust of our residents as well, some of the really hard to reach groups, have a great relationship with their housing officer, or have a very good relationship with their health visitor or whatever. By going through these channels, we can get stuff to them and get them to take on a message better than they would just seeing a TV ad or something else”</i> (Interview 7)</p>
Local authority respondent C	<p><i>“if part of the aim of the campaign is to drive people to services then we’re the people that commission services usually. So, there’s got to be a link-up”</i> (Interview 10)</p>
PHE respondent D	<p><i>“you piggyback on the relationship that those partners have, that otherwise you wouldn’t have as just PHE or just DH”</i></p>

Partnerships agency respondent A	<i>"to reach the audience in a meaningful way. If a partner can communicate our messages in their own style, in their tone of voice that the audience is used to, then it's more likely to get through"</i> (Interview 2)
Partnerships agency respondent C	<i>"not only do they [PHE] not necessarily have that, you know, relationship, that direct relationship with the audience, there's also in some degree and in some areas a lack of trust"</i> <i>"I think that's where partners are uniquely placed. They are present at those points of purchase, consumption, influence, behaviour change to actually support people, to nudge them, to support them in changing that behaviour in their community, in their workplace, in their school, you know, at their hospital bed, where we can't be, or Public Health England and Department of Health can't be. I mean, the audience, very much the audience need and trust. And so the drivers for that really were around finding trusted voices that engage with these audience groups and that have the solutions. Again, you know, Public Health England and DH don't have the solutions at their fingertips, you know. They don't manufacture the products; they don't sell the products"</i> (Interview 11)

Document Name	Findings – Change in social marketing approach
Change4Life Marketing Strategy 2009 (DH)	<i>"strategy to have campaign spikes each year, one in January and one in July, and for partners to support these spikes"</i>
Change4Life 3- year Marketing Strategy 2011- 2014 (DH)	<i>"as the number of partners increase there will be resource implications for the partnership team - the team that currently brokers partnership deals, manages relationships with partners and evaluates the efficacy of partner commitments will be maintained"</i>
PHE Marketing Strategy 2014- 17	<i>"Change of definition for social marketing – emphasis on interactivity and public participation"</i> <i>"marketing strategy was developed in consultation with key partners"</i>

	<p><i>“co-creation with partners particularly by working with content brands who resonate with the target audiences”</i></p> <p><i>“strategy shift towards a more year-round content-driven marketing approach with support of partners”</i></p> <p><i>“partnerships included as one of the core principles of the strategy”</i></p> <p><i>“we only ever work in partnership”</i></p> <p><i>“PHE Marketing will never deliver a campaign unless it is part of and actively supported by a broader range of partners”</i></p> <p><i>“largest partnerships team in government working with 214 key national and 70,000 local partners”</i></p> <p><i>“partners are the foundation of an approach that supports at risk audiences in making changes to their behaviour’s day in day out”</i></p>
PHE Marketing Strategy 2014-17 one year on	<p><i>“work in partnership with over 200 national organisations, including Disney, Asda and Boots”</i></p> <p><i>“requires the maintenance of strategic partnerships”</i></p> <p><i>“developed a new strategic partnership with Disney and maintained existing partnerships with four major retailers – Asda, Tesco, The Co-Operative and Aldi”</i></p>
PHE Social Marketing Strategy 2017 to 2020	<p><i>“work with partners who are already engaging with our audiences to mould programmes around the rhythm of their lives rather than seeking to persuade people to change their behaviour at points that fit in with campaigns”</i></p> <p><i>“strategy of creating platforms that can be amplified by a range of partner voices and to provide engaging content that these partners will want to customise and share”</i></p> <p><i>“aim to make branded programmes part of the fabric of people’s lives, so that they can appear on high streets, in schools and in GP surgeries, not just as posters or leaflets, but as prescriptions, lessons, events and locally commission services”</i></p> <p><i>“over the past three years PHE have developed an increasingly sophisticated model for engaging with local areas. PHE create branded programmes that local areas can use to engage their</i></p>

	<i>populations, to communicate healthy behaviours and even as a platform for commissioning services.</i>
Observation notes	<i>“partners have a genuine capacity to effect and support behavioural change”</i> <i>“partners better placed than PHE to motivate behaviour change”</i>
PHE respondent G	<i>“I think it’s moving because historically the partnerships have been about amplifying what’s been created within a campaign. So historically, we would have said, okay, it’s all about sugary snacks, now let’s create some assets and let’s make sure that we get all the partners to do as much as we can at the same time. I think now we’re looking at different models, the partners, they don’t have to support a campaign. But if they can support an issue or if they can support a calendar moment in time that suits them, then we’ll put in a little bit of money, but actually, the partnership is really the key driver for the whole thing. So, it’s a partner-driven campaign, as opposed to here’s a campaign that’s got partnership support”</i> (Interview 18)
PHE respondent A	<i>“That [partnerships] should be baked in right at the beginning of the strategy...this is what we’re trying to achieve. These are the people we’re trying to reach. And these are the partnerships that can help us do that. And then building any campaign activity around that”</i> <i>“I think, if you have the right suite of partners and partnerships, you should then, on the back of that, be defining what the campaigns are”</i> (Interview 1)
PHE respondent E	<i>“I think PHE’s strategic decision has been that partnerships are just as important as how you activate and also the strategy and planning function. So, it’s an absolutely fundamental part of the future of how we’re going to deliver things and, actually, I personally think increasingly it will become the only way that we deliver things, that we will become more focussed, we always have at the heart, how can we deliver this with partners?”</i> (Interview 16)
Partnerships agency respondent C	<i>“at that point partnership marketing had been considered a very tactical tool within the marketing mix”</i>

	<i>"a realisation that actually partnerships needed to be at the core and was a strategic marketing tool as opposed to being on the fringes and a tactical marketing tool" (Interview 11)</i>
Partnerships agency respondent B	<i>"I think it's shifted massively. It's becoming way more of a very strategic, much more, kind of, thought-through science – there are a few reasons, so with topics that are sensitive or are more personal, I think it's that they appreciate that they're not necessarily the most relevant voice through which to speak, and that they, by putting their own voice within the relationship, they might create a bit of friction or barrier that doesn't need to be there"</i>

Document name	Findings - Target audience
Change4Life Marketing Strategy 2009 (DH)	<i>"many organisations have influence with and can reach our target audiences in ways we cannot"</i>
Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011 (DH)	<i>"Commercial brands often have trusting relationships with our key target audiences and can reach them in ways that we cannot, and that are closer to the behaviours we want to influence, for example via targeted offers as part of their loyalty programmes, through in-store signage or by putting nutritional information on restaurant menus"</i>
PHE Marketing Strategy 2014-17 one year on	<i>"Co-create more campaigns, particularly by working with "content" brands such as Disney that resonate with our target audience"</i>
PHE Social Marketing Strategy 2017 to 2020	<p><i>"Motivation can come from many places – rather than seeking to persuade people to change their behaviour at points that fit in with our campaigns, we increasingly mould our programmes around the rhythm of their lives. We do this by working with partners who are already engaging with our audiences"</i></p> <p><i>"Our target audience may trust or engage with others more than us: while we are proud of the evidence base behind all the guidance"</i></p>

	<p><i>we provide, we also recognise that many in our audiences trust others, whether that's friends and family, social media, faith leaders, charities or commercial brands, more than they trust government. Rather than fighting this, we work with it. We work in partnership to build coalitions for change"</i></p> <p><i>"Why we do it – many organisations have an existing, direct, trusted relationship with our target audiences and can reach them, and influence their behaviours, in ways that we cannot"</i></p>
Observation notes	<p><i>The intention is to launch One You with a number of high-profile commercial partners who resonate with the target audience including retailers, pharmacy, leisure and healthcare brands.</i></p> <p><i>Identified top 20 partners with reach to target audience.</i></p>
PHE respondent B	<p><i>"The only way to change behaviour is to tap into all the everyday touchpoints for the target audience, target brands that are in the everyday, tap into the expertise of other organisations" (Interview 1)</i></p>
PHE respondent C	<p><i>"because we're trying to do this at scale, we're trying to talk to 152 unitary Local Authorities and we're trying to talk to the whole of the NHS, which is a massive organisation, the first thing we tend to do is basically, actually the commercial sector as well, is for us to look at the objectives we have for any given piece of work, taking a campaign, we'll look at our target audience and the objectives. And start to have a think about what we know about our target audience, map out their daily lives and understand the touch points that Local Authorities or the NHS might inject into that daily life. So, we'll start to spot where there are opportunities for us to get in and influence what's going on in people's lives"</i></p>
PHE respondent D	<p><i>"Who are the target audience? Where do their lives go? Where do their lives take them? Where are their touchpoints with potential partners?" (Interview 15)</i></p>
Partnerships agency respondent A	<p><i>"If a partner or an organisation has access to the target audience that we need to speak to, then it's brilliant, if we can use their channels to kind of access target audience. The other thing is being able to reach the audience in a meaningful way as well"</i></p>

	<p><i>"There's trust with the target audience that that partner has. We monitor the trust between the target audience in that organisation"</i> (Interview 2)</p>
Partnerships agency respondent B	<p><i>"leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and the credibility that they can provide, to interpret a behaviour change message in their own words through points in time that are highly relevant to getting people to take that action"</i></p> <p><i>"So, reach the target audience rather than just mass reach. So, there's reach to the target audience, there's relevance to the issue and the person, and the way that I would describe that is, does that brand have permission to talk specifically about this topic to the end audience? And then impact is, does that brand actually have the channels and the wherewithal to be able to communicate a message which will be seen"</i></p> <p><i>"Being able to bring the knowledge and expertise of experts about the target audience"</i> (Interview 5)</p>
Partnerships agency respondent D	<p><i>"Change4Life were looking for a partner that could really, had great reach and engagement with our target audience"</i> (Interview 19)</p>
Partnerships agency respondent C	<p><i>"I think partnerships are going to become more and more important to PHE and Department of Health. It's not just a function of increasing pressures on budgets but I think it's also a function of our audience"</i> (Interview 11)</p>
Local authority respondent D	<p><i>"there's no way PHE could deliver at a local level, you know, feeding into kind of every aspect to reach that target audience, so it's tapping into the actual contact points of people's everyday lives"</i> (Interview 13)</p>
Commercial partner respondent D	<p><i>"with us we discuss about how we deliver more engagement with their target audience"</i> (Interview 12)</p>
Commercial partner respondent E	<p><i>"from PHE's point of view they wanted to get their message about the campaign and reaching that new target audience that had"</i></p>

	<i>never been reached before that 40 to 60 year old group” (Interview 21)</i>
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Document name	Findings – Always-on campaigns
Change4Life Marketing Strategy 2009 (DH)	<i>“strategy to have campaign spikes each year, one in January and one in July, and for partners to support these spikes”</i>
PHE Marketing Strategy 2014-17	<i>“Shift towards a more year-round content-driven marketing approach”</i>
PHE Social Marketing Strategy 2017 to 2020	<p><i>“We use our resources to create platforms that can be amplified by a range of partner voices and to provide engaging content that these partners will want to customise and share. We also create always on partnerships to influence behaviour at point of purchase; for example, with MySupermarket.com”</i></p> <p><i>“Work towards a major new partnership with a digital platform owner, to enable people to make healthier choices to their lifestyles”</i></p> <p><i>“New partnership opportunities are emerging and we will seek to form coalitions among those who reach and engage our audiences.”</i></p> <p><i>“Continue to strengthen our relationships with the technology sector to encourage them to deliver evidence-based digital health tools to engage people at scale in their health”</i></p> <p><i>“Embed One You as a key behaviour change vehicle, both at a national and local level, working with local authorities and improving our always on digital offering”</i></p> <p><i>“Work with the technology industry to co-create health behaviour interventions through their platforms”</i></p>
PHE respondent E	<i>“you are not going to affect the type of behaviour change and engagement that you want if you just do that in a short-term burst”. (Interview 16)</i>

Partnerships agency respondent C	<i>"we have some partnerships which are what I would describe as always on. In other words, they just run, you know, 365 days a year so it, you know, constantly turns on in digital channels" (Interview 11)</i>
Partnerships agency respondent D	<i>"the evolution really comes from looking to work less to potentially our campaign spikes but when partners want to deliver a message. Because all of our health messages are always on, there is always a valid time to talk about them. There are ones that we identify to be strategically most effective, but partners might choose to deliver that message in a way that is most effective to their calendar and their moment. And so, flexibility in working with them to when it best suits them would allow us to do potentially more with them as well" (Interview 19)</i>
Partnerships agency respondent B	<i>"I think as the always-on strategy develops some partners will prove more helpful at that than others"</i> <i>"does that brand actually have the channels and the wherewithal to be able to communicate a message which will be seen, and that's one of the areas where it's massively changed. So, the impact bit is important, but that's really changed, because now you can do something which is, you know, wholly social which would get cut-through" (Interview 5)</i>
Commercial partner respondent D	<i>"I think the next step is this always on and how we can deliver it together, how we can get even more connection from kids over a longer period of time" (Interview 12)</i>

Document name	Findings – Coalitions of partners
Change4Life Marketing Strategy 2009 (DH)	<i>"Bringing together a coalition of local, non-governmental and commercial sector organisations that will use their influence to change behaviour"</i> <i>"We have assembled a cross-societal collaboration of workforces, government departments, NGOs, local activists and commercial brands"</i>

Change4Life One Year On 2010 (DH)	<i>"Coalition of grassroots supporters, NHS and local government staff, commercial sector partnerships and non-government organisations joining forces with the Government to bring Change4Life to life"</i>
Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011 (DH)	<i>"Create coalitions of public, private and third sector organisations to drive change and engage the public wherever they are"</i>
PHE Health and Wellbeing social marketing plan 2013-14	<i>"Continue to deliver a cutting-edge partnership programme that makes it easy for our coalition of partners to invest in inspiring and supporting our key audiences to make and sustain changes in their behaviour that will enhance their wellbeing"</i>
PHE Social Marketing Strategy 2017 to 2020	<i>"We will work in partnership to build coalitions for change"</i> <i>"Build a broad coalition that helps all of us take healthier decisions, reaching out to individuals and families, and working with retailers, manufacturers and other businesses to help make the healthy choice, the easy choice"</i>
Observation notes	<i>Building the coalition – One You needs to live in people's lives and touch every aspect of people's lives.</i> <i>One You to have the country's biggest health coalition including companies, NGOs and national and local government.</i> <i>Building a coalition for action.</i>
PHE respondent C	<i>"So, coalitions I guess the basis for doing those, is that they can be greater than the sum of our task" (Interview 14)</i>
PHE respondent D	<i>"If you get that coalition of supporters all delivering the same message at the same time, you have a much more effective campaign" (Interview 15)</i>
PHE respondent F	<i>"So, the traditional approach is for us as PHE to develop a campaign and then go out and sell it to partners and find partners"</i>

	<i>who will potentially be interested in using that campaign. In this instance what we talked about was how can we work with partners to develop a campaign that supports their goals and our goals at the same time and match the partners from the beginning and then develop the campaign around that coalition of partners.” (Interview 17)</i>
PHE respondent G	<i>“In an ideal world, you would have a big range of people supporting an agenda, and I think when we first launched Change4Life, there was a broader coalition of people all doing something at the same time. And, you know, when we launched Change4Life, [partner name] stood up with us and [partner name] stood up with us, and lots of people stood up and declared their support and action. You know, so there was a broad coalition or church of people doing stuff. And I tend to use coalitions for change rather than creating social movements” (Interview 18)</i>
Partnerships agency respondent A	<i>“Change4Life, I think the ambition originally when it first started off, was for it to be a movement, and it needed a set of strong voices to start to communicate probably challenging messages for parents. So, you know, you’re talking about children being overweight and obese, you know, it’s quite a sensitive subject area, and the scale of the problem meant that it had to be more than just Department of Health back then, or Public Health England now, talking about it. You need a range of partners who are providing solutions to help, you know, provide a solution to that problem. So, I guess that’s where the coalition was built” (Interview 2)</i>
Partnerships agency respondent D	<i>“It’s interesting actually because often... And partners do agree with this. When we work with a coalition of partners, the messaging is more credible as a result. So, there are partners that recognise they’re all doing similar work in the same space, but it’s that kind of old adage that, you know, a group of partners is kind of stronger than one working alone”</i> <i>“And so that coalition allows for that credibility of the offering because it’s a number of different partners working together rather than one. It sometimes isn’t the case, but, it’s also from a PHE perspective, it’s more credible. Because again it ensures that we’re not offering exclusivity to one over another. But also our biggest</i>

	<p><i>ambition with our partners is to drive that frequency of message across the year to drive behaviour change. Because we know that that frequency of message is important in ensuring that there are those nudges towards positive behaviour change. And we can only look to do that through working with a coalition of partners in a number of different ways rather than with one partner in one way. It's the way in which you look to define it at the beginning. So Change4Life's coalition of partners has been built over eight years now. And so, we've had the opportunity there to build a coalition of partners that have different roles at different times of the year"</i></p> <p>(Interview 19)</p>
Local authority respondent A	<p><i>"So I certainly feel part of it in terms of a coalition of 152 local authorities, and in the fact, we have semi-regular meetings where authorities will come together and feel kind of like they have some input or some at least updates around what's happening, certainly aware of the other partners that PHE work with."</i> (Interview 6)</p>
Commercial partner respondent C	<p><i>"They get credibility, but also consumer choice, and when there's a coalition partners, it tends to touch different points of the funnel. So, they are usually a healthcare partner, a commercial partner, retailer, you know, an activity partner."</i> (Interview 8)</p>
Commercial partner respondent D	<p><i>"It's not yet an active coalition. I don't think so we have an active partnership of partnerships yet"</i> (Interview 12)</p>
Commercial partner respondent A	<p><i>"So, actually having that, you know, coalition of partnerships where you're bringing people who've got a different role to play, a real diversity"</i> (Interview 4)</p>

Document name	Findings - Definition of partnerships
Change4Life One Year On 2010 (DH)	<i>"partnership marketing (the creation and dissemination of messages and offers by C4L partners)"</i>
Changing Behaviour, Improving Outcomes – a	<i>"Partnership marketing – marketing activity where two or more organisations campaign together to support shared aims. Usually no money changes hands between them"</i>

new social marketing strategy for public health 2011 (DH)	
Observation notes	<i>"the development and delivery of government messages via partnerships with private and public sector organisations, using a partner's range of marketing channels, generally for free"</i> (Cabinet Office, 2007)
PHE respondent F	<i>"the definition of partnership is something that very much evolves and has evolved since the... since I've been in post and continues to evolve"</i> (Interview 17)
Partnerships agency respondent B	<i>"it's [the definition] changed quite a bit over the years"</i> (Interview 5)
PHE respondent A	<p><i>"So, I would say a partnership is a collaboration between two organisations, where there is shared objectives. Or there is a mutual benefit created for both parties"</i></p> <p><i>"it's about bringing all the assets of both organisations together and the expertise of both organisations to, kind of, add up to something more"</i> (Interview 1)</p>
PHE respondent C	<i>"What underpins them all is having some shared objectives that each side is working towards, having a clear understanding of what each partner brings to the table"</i> (Interview 14)
PHE respondent E	<i>"Taking a concept or a behavioural change initiative that you want to deliver to a consumer or to a member of the public but harnessing the power and energy of other organisations who have reach or relevance to the audience that you're trying to target"</i> (Interview 16)
PHE respondent G	<p><i>"An ideal partnership would be a joint, mutually beneficial relationship that met objectives for the various key partners or that had a win-win in it for various key partners within it"</i></p> <p><i>"Partnerships tends to be used around government as a term, but actually it's about the discipline of how do you market to</i></p>

	<i>intermediaries to get them to then carry your messages and market on to the end customer” (Interview 18)</i>
Partnerships agency respondent C	<i>“It’s a mutually beneficial strategic relationship between organisations, as opposed to being, you know, a tactical relationship between one campaign team and another campaign team to execute a particular campaign” (Interview 11)</i>
Partnerships agency respondent D	<i>“Where the organisation’s strategic objectives are aligned to Public Health England’s priorities. To identify whether joint opportunities are to work together across their owned and earned channels. A true partnership is where those strategic ambitions and health priorities align” (Interview 19)</i>
Local authority respondent D	<i>“The exchange of either providing content, resources, ideas, support, and that working reciprocally with the other partner as well” (Interview 13)</i>

Data Source	Findings – Partner selection
PHE respondent E	<i>“from the outset we were just, you know, let’s just get as many partners as possible. You know, eight or nine, ten years ago it was like, you know, please come and do, you know, join us in this but now I think we are much more sophisticated in that we’ve got established relationships, so our model has changed in terms of the mapping process” (Interview 16)</i>
Partnerships agency respondent D	<i>“looking at it through the lens of the consumer or customer and what the journey is that they would go through” “a criteria by which you shortlist and prioritise those organisations that you’d wish to work with. That varies depending on the kind of the campaign that you’re working on and the objectives of the campaign. A useful way of shortlisting is by reach, relevance, and impact” (Interview 19)</i>
Partnerships agency respondent C	<i>“we always start with the audience, so you know, everything has to be audience-centric. So, what are the partners or the organisations that have a relationship already with this audience, whoever it is? And that helps us to identify which categories we should be working with. And then within the categories we then start to look at well,</i>

	<i>who, you know, who can deliver the biggest bang for buck, really. Who's got the best reach? Who's the most relevant? You know, whose goals align, you know, most seamlessly with ours? And then that starts to help you prioritise which ones would be probably the most advantageous to work with. And then you always screen them against risk" (Interview 11)</i>
Partnerships agency respondent A	<i>"relevance to the message" "reach to the people that we want them to reach" "trust with the target audience" (Interview 2)</i>
Observation notes	<i>Organisations with a genuine capacity to effect and support behavioural change</i>

Data Source	Findings – Co-creation
DOC8 (Sept 2017)	<i>"We have moved from a model whereby partners amplify our programmes and distribute our messages to co-creating programmes across a breadth of sectors"</i>
PHE respondent F	<i>"once you then establish that you both want to work on the same thing, you go into campaign creation and co-creation and that's very much about a series of workshops, coming up with a sort of strategic idea that can hold the whole partnership together and then working on the tactics that would end up delivering it to the consumer" "that all then comes down to the co-creation process that tends to be a PHE partner-led thing, so individual partners, working with us on their particular contribution to the campaign" "I go along and meet those people, either having a workshop where we can sort of talk about the different elements, and trying to sort of co-create the partnership as we go along" (Interview 17)</i>
Partnerships agency respondent D	<i>"the reason for that is that there is an opportunity either for them to focus on a particular behaviour with us and therefore co-create messaging and content around that behaviour. Or indeed are able to, within one particular channel, really do something that's quite high-profile"</i>

	<i>"if we really want to allow for co-creation with key strategic partners, we need to work to longer lead times than we do right now. So, if we truly, some of these partners take 12–18 months in planning to develop something that's truly strategic and works to both parties" (Interview 19)</i>
Partnerships agency respondent C	<i>"I think that's about continuing to work in a co-creation way"</i> <i>"a great opportunity for them to really come in and create something with us which—co-create something with us—which they, we, effectively together would own. So that then led to 10-minute Shakeup, which was, really, a very successful campaign" (Interview 11)</i>

Data Source	Findings – Identification of strategic partners and signposting partners
PHE respondent F	<i>"you've got a few very big strategic partners who deliver high impact, high value partnership activity, possibly based on more than one campaign often. Or just a very significant campaign delivery on one campaign area" (Interview 17)</i>
Partnerships agency respondent A	<i>"it comes down to what the role of that partner is, So, you've got partners who are longer term strategics, we're involved in their marketing plans and their business planning. There's signposting partners, we can give them a number of assets or a toolkit and they will simply display those messages for us; which, you know, is still really important because it gets messages across the target audience, but it doesn't need as much management and handling of that particular partner" (Interview 2)</i>
Partnerships agency respondent D	<i>"That recognising there is different roles for partners and they are all valid. So, it is not just the key strategic partners, but there's... What we call signposting partners is hugely important, and they need to go hand in hand. And we can't forget that. Um, because that credibility and that frequency of message that we deliver through a number of partners sharing our content in their channels is still vital, and so, that is something that we still place huge value on"</i>

	<p><i>“signposting partners ... help those campaigns go further at a grass roots level. And so, signposting partners are also those that can simply be used to activate the campaign and amplify the campaign in their channels, simply using our messaging, in a way that they see best suits them”</i></p> <p><i>“there are those that are strategic partnerships. And the reason for that is that there is an opportunity either for them to focus on a particular behaviour with us and therefore co-create messaging and content around that behaviour. Or indeed are able to, within one particular channel, really do something that’s quite high profile”</i></p> <p><i>“the health priorities align and that therefore lends itself to co-creation where both tones of voice are kind of leveraged” (Interview 19)</i></p>
PHE respondent E	<p><i>“partnership is a strategic long-term one”</i></p> <p><i>“you are not going to affect the type of behaviour change and engagement that you want if you just do that in a short-term burst”</i></p> <p><i>“trying to change people's behaviour can't happen overnight, so therefore your partnership should not just be an overnight thing” (Interview 16)</i></p>
PHE respondent A	<p><i>“for me, partnerships are all about relationships essentially. And it takes a long time to establish the trust required for a really long-term relationship like [partner name]. And I think the real, kind of, work has actually been in maintaining that over the last seven years. Because it takes a lot of work to do that. And it takes a lot of, kind of, maintenance of that relationship” (Interview 1)</i></p>
PHE respondent D	<p><i>“so, with a long-term partnership, I think you can build some of that depth. Once they are used to, you are both used to each other’s ways of working, so that we get better at meeting their needs and they start to understand our capacity to deliver and, you know, sometimes our limitations and, you know, and how to get the best out of us for what they want. That also helps build and improve the outputs for both parties, really” (interview 15)</i></p>
PHE respondent E	<p><i>“if you’re going to have any kind of credibility you can’t just turn up one day and say, right, this is what we’re going to do today and</i></p>

	<p><i>we're going to do it for a couple of weeks and then we're going to walk away"</i></p> <p><i>"that doesn't mean to say there isn't a place for one-off partnerships but trying to change people's behaviour doesn't happen overnight, so therefore your partnership should not just be an overnight thing" (Interview 16)</i></p>
Partnerships agency respondent B	<p><i>"longstanding ones where there's a relationship built over time" (Interview 5)</i></p>
Partnerships agency respondent C	<p><i>"long term strategic working across multiple issues or agendas"</i></p> <p><i>"individual campaign specific working on single issues" (Interview 11)</i></p>
Partnerships agency respondent A	<p><i>"it's great that signposting partners exist, but a longer-term strategic relationship gives you the opportunity to develop things in a very bespoke way for that partner and for Public Health England as well. So, you're more likely to be successful in what you're trying to do if you have a longer-term relation, because you get to know each other a hell of a lot more"</i></p> <p><i>"a partnership is based on relationship building and you get a hell of a lot more out of an organisation if you've had time to build that relationship. You know, it's like any kind of relationship, I guess, you get to know each other. You get to know what their business objectives are, you can start to ensure that you're helping them meet their own business objectives and they get to know you as well and they understand more what it is that we're trying to achieve and how to achieve it. So, you just get a better-quality relationship when it's a longer-term relationship" (Interview 2)</i></p>
Local authority respondent E	<p><i>"I think when you look at the big agendas in here, obesity...obesity needs long-term partnerships and there are ready made players who can influence the childhood obesity agenda, and it's the supermarkets and it's the food manufacturers, and it's the drinks manufacturers. So, you have to try and aim to keep some long-term relationships going there" (Interview 20)</i></p>

Commercial partner respondent B	<p><i>"I think it's long-term strategic partnerships on big issues such as eating healthier, stopping smoking"</i></p> <p><i>"I think, once you have a credible partner, that credibility only grows within the consumer eye. So, longevity is actually really important"</i></p> <p><i>"you've been on that journey together, you've got learnings, you know what happened in the past campaign, and you've got the knowledge of each of the organisations and how they work"</i></p> <p>(Interview 8)</p>
Commercial partner respondent C	<p><i>"the fact that we've gone through it before should have the advantage that it's not all new"</i> (Interview 9)</p>

Data Source	Findings – Categories of partner
DOC8 (Sept 2017)	<i>"commercial sector, voluntary sector and local authority partnerships"</i>
Observation notes	<i>One You campaign ambition to have the country's biggest health coalition including companies, NGOs and national and local government</i>
PHE respondent A	<i>"there's public sector partnerships and there's commercial partnerships"</i> (Interview 1)
PHE respondent B	<i>"commercial and non-commercial"</i> (Interview 3)
PHE respondent D	<i>"so, there is commercial private-sector partners, public sector and NGOs"</i> (Interview 15)
PHE respondent C	<i>"includes local authorities and NHS for us, in the health system, but it also includes the volunteer community sector partnerships as well"</i> (interview 14)
Partnerships agency respondent C	<i>"commercial partnerships ... partnerships with not-for-profit organisations ... local partnerships"</i> (Interview 11)
Local authority respondent D	<i>"there's definitely a distinct difference between commercial and kind of public sector"</i> (Interview 13)

Local authority respondent A	<i>"the local delivery partner can then use to really localise it, and then kind of get a lot more out of it than we would on our own" (Interview 6)</i>
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Data Source	Findings – Uncertainty
Observation notes	<p><i>Uncertainty – impact on partnerships</i></p> <p><i>One You campaign timeline and launch – lack of clarity creating uncertainty for partners</i></p> <p><i>Change of dates</i></p> <p><i>Inability to plan ahead</i></p> <p><i>Nervousness to commit to support</i></p> <p><i>Requirement of partners keeps changing</i></p> <p><i>Change of dates – impact on local plans</i></p> <p><i>One You – change of launch date – letting partners know – lose trust and momentum</i></p> <p><i>Issues of not being able to tell partners what plans are</i></p>
PHE respondent A	<p><i>"I mean I think there's definitely uncertainty now"</i></p> <p><i>"Managing uncertainty, again, it's just being clear about, like, what the situation is" (Interview 1)</i></p>
PHE respondent C	<i>"there's a lot of uncertainty" (Interview 14)</i>
PHE respondent E	<i>"clearly times are going to get really challenging with all the uncertainty that comes with Brexit" (Interview 16)</i>
PHE respondent B	<i>"I don't personally feel it [uncertainty]. But I can see how it might affect the landscape" (Interview 3)</i>
Partnerships agency respondent A	<i>"Honesty. Honestly, it's honesty. That's the best way, I think. You've got to be able to have that honest conversation with the partner, and to let them know what's going on" (Interview 2)</i>
Commercial partner respondent C	<i>"Yes, absolutely, both this year and last year. You know, the whole of the department seemed to stop for months after months because we had a referendum on being in the EU" (Interview 9)</i>

Commercial partner respondent E	<p><i>“there have been campaigns that have just, sort of, we just haven’t had a date for. I think Active 10 was one of those actually. I think it was supposed to launch early in the year in sort of April. And then because of elections and purdah and all the rest kept getting put off and then eventually it didn’t happen until September. And I think that did have an impact because it probably wasn’t as strong as it could have been because you get excited about a campaign at the beginning of it don’t you. And you get people on board and then things change and it all drops off. And so, you do lose the impetus I think. I think that is something that can go wrong and it can create uncertainty, so, yeah, I think that does have an impact certainly”</i></p> <p>(Interview 21)</p>
Commercial partner respondent A	<p><i>“we know it [uncertainty] does have implications in terms the outcomes of the programme”</i></p> <p><i>“quite problematic last year because of, you know, delays in terms of the time”</i> (Interview 4)</p>
Commercial partner respondent D	<p><i>“So, from our perspective we just had to be patient and wait for the, you know, it wasn’t a storm exactly but, you know, wait for some clarity on the direction that we’d get from the new government”</i></p> <p>(Interview 12)</p>
Local authority respondent C	<p><i>“in a practical sense, you do wonder what’s going to be stopped and what’s going to come”</i> (Interview 10)</p>
Local authority respondent A	<p><i>“one of the challenges was the fact that we were never 100% sure when the national brand [One You] would launch”</i></p> <p><i>“I guess there’s always been a bit of an issue between local authorities and PHE around timelines for campaigns and the uncertainty”</i> (Interview 6)</p>

Data Source	Findings – Political change
PHE respondent A	<p><i>“suddenly you get landed with something like Brexit, which just, kind of, brings the machine to a halt and that can have quite a negative impact when you’re, sort of, pushing back timelines and you’re pushing back commitments”</i> (Interview 1)</p>

PHE respondent E	<i>“clearly times are going to get really challenging with all the uncertainty that comes with Brexit” (Interview 16)</i>
Commercial partner respondent B	<i>“we were campaign planning and when the general election was called, we had got meetings scheduled in, that meant they had to go on hold. Because until the new government was formed and whatever health issues they were going to champion, that meant then the planning could actually completely change”</i> <i>“that could’ve potentially affected the, not the partnership but the strategy that we were going forward with” (interview 8)</i>
Commercial partner respondent A	<i>“the One You programme, which was all set to go live, and something totally out of PHE’s control, you know, impacted it. Last year’s EU Referendum, you know, wasn’t really embedded in the plan and then the fall out of that” (Interview 4)</i>
Commercial partner D	<i>“we had to navigate Brexit. We had to navigate through the realities of that” (Interview 12)</i>
PHE respondent C	<i>“we are a civil service and, you know, we are bound by the politics and that’s ever-changing. And I think because our key partners are local authority, who similarly have those kinds of pressure kind of at a local level, there is an understanding there” (Interview 14)</i>
Local authority E	<i>“because we work in a political environment that we’re kind of used to the challenge that might bring in terms of delays and late changes” (Interview 20)</i>
PHE respondent C	<i>“the political environment can impact in terms of the people, that they’re being driven to secure, perhaps there may be pressure coming down from Government, for example, to hold industry to account sometimes” (Interview 14)</i>
PHE respondent E	<i>“policy changes and shifts do dictate actually how hard or easy it is to engage” (Interview 16)</i>
Commercial partner respondent E	<i>“it does change with the political landscape and there will be times when government is more open depending on what the public perception is. More open to government working with commercial partners and less open” (Interview 21)</i>

<p>Partnerships agency respondent C</p>	<p><i>“how important it is that government makes an investment in this as well and doesn’t abrogate to partners responsibility for things that people feel is where government has a role”</i></p> <p><i>“a level of [government] investment is important. It provides the air cover. It provides the rallying call, the reasons for the partners to come round the table”</i></p> <p><i>“government needs to demonstrate that this [issue/campaign] is important and it will be recognised and there is a role that government is uniquely placed to fulfil, raising awareness of the issue and the consequences”</i></p> <p><i>“in the very early days we had the obesity strategy, Healthy Weight Healthy Lives, and that’s why many [partners] came to the table”</i></p> <p><i>“it’s amazing that we’ve kept the campaigning with partners going over a period where actually there was a pulling back from the obesity strategy, pulling back from the responsibility deal. So, we didn’t have any policy with real teeth to hang our campaigns off”</i></p> <p><i>“this is a very important point I haven’t mentioned which is how important it is for partners that actually there is that alignment with the policy [of Government] and marketing goals [of PHE]” (Interview 11)</i></p>
<p>Change4Life 3-year Marketing Strategy 2011-2014 (DH)</p>	<p><i>“there will be a radical step-change in the proportion of the campaign that is funded by partners”</i></p> <p><i>“Partnership marketing seeks to attract additional non-government activity to the programme”</i></p> <p><i>“the Coalition Government has a clear intent to devolve responsibility to partners, both civic and commercial”</i></p>
<p>Changing Behaviour, Improving Outcomes – a new social marketing strategy for</p>	<p><i>“from April 2013, responsibility for public health marketing will move to local authorities, as they take on responsibility for public health”</i></p> <p><i>“partners, community, charity, civic and commercial will be encouraged to do more”</i></p> <p><i>“in the past, our approach was “how can Government achieve this?” In the future, we will start from the presumption that others may be better placed to achieve our goals, often working in partnership with us”</i></p>

public health 2011 (DH)	
PHE Health and Wellbeing social marketing plan 2013-14	<i>“we will refine and refocus our approach to partnerships, for example by brokering national partnerships with large companies, national media owners and other key influencers of health to deliver depth, scale and momentum to our programmes”</i>
PHE Marketing Strategy 2014-17	<i>“making the Change4Life brand available to a wide range of partners – public, private and third sector – has also enabled the movement to reach into areas a Government brand could not and sustained the movement during the period when government spend was absent”</i>

Data Source	Findings – Economic climate
DOC4 (Oct 2011)	<i>“This strategy responds to the changing political and economic climate to propose a new approach to how marketing will be used to influence health related behaviour”</i>
PHE respondent E	<i>“I think there were some very, very deliberate decisions we made that were a result of budget challenges back in 2010/2011 when clearly, you know, when we went from £X million worth of public health marketing budgets down to sort of £X million, which is where we are now, it requires you to think creatively about how you delivered things” (Interview 16)</i>
PHE respondent C	<i>“we have a programme that started out attracting value in client investment from commercial partners to boost marketing budgets” (Interview 14)</i>
Partnerships agency respondent D	<i>“the economic climate means that we need to lean more on corporates to promote a pro-social message, and actually more corporates are interested in doing that, so it’s a way of extending our budgets and being more efficient” (Interview 5)</i>
Partnerships agency respondent A	<i>“the budgets over the last few years have been dwindling and yet we still have an enormous public health job to do. So, if a partner has access to the target audience that we need to speak to, then it’s brilliant if we can use their channels to kind of access the target audience” (Interview 2)</i>

Data Source	Findings – Social change
DOC3 (April 2011)	<p><i>“The research found considerable change among the target audiences, driven in part by programmes such as Change4Life, but also by the changing social and economic landscape. This strategy responds to the findings of that research”</i></p> <p><i>“the Coalition Government has committed to continuing Change4Life. However, the programme will change in response to changing needs of its target audiences and to the emerging evidence base”</i></p> <p><i>“the profound changes to the public health system necessitate a new approach to national health marketing that builds on previous successes”</i></p> <p><i>“take a life-course and place-based approach – reaching people both directly and indirectly in schools, via commercial brands, employers, through health and social services, and in their local communities”</i></p>
PHE respondent A	<p><i>“When I started working in this area [partnerships] it was really commercial organisations doing it as corporate social responsibility. I think particularly with the increase of social media and I think with the millennials in particular, who are much more demanding of their, I guess, the brands that they engage with and the workplaces that they engage with. So, they’re much more about purpose led organisations. I think they call it really sustainability. But the objectives around, you know, how can we increase engagement with our consumers? How do we offer healthier options? Really thinking about how their brands are more purpose led. And that leads to a change in how you develop those longer-term relationships. They’re really looking to partner with people that they can create change with over the longer period. And I think we’ve seen some of that opportunity at PHE” (Interview 1)</i></p>
PHE respondent D	<p><i>“our partners are more sophisticated” (Interview 15)</i></p>

Local authority respondent E	"developing the tools that respond to actually how people live and developing those partnerships" (Interview 20)
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Data Source	Findings – Technological developments
DOC8 (Sept 2017)	<p><i>"work towards a major new partnership with a digital platform owner, to enable people to make healthier choices to their lifestyles"</i></p> <p><i>"where will digital go next?"</i></p> <p><i>"new partnership opportunities are emerging and we will seek to form coalitions among those who reach and engage our audiences"</i></p> <p><i>"continue to strengthen our relationships with the technology sector to encourage them to deliver evidence-based digital health tools to engage people on scale in their health"</i></p>
Observation notes	<p><i>PHE want to engage the target audience in the digital space including social media</i></p> <p><i>PHE developing apps and an online quiz for One You to engage target audience</i></p>
PHE respondent C	<i>"the future of partnerships is looking at, there are different models, so in our digital workspace those partnerships could be quite different"</i> (Interview 14)
PHE respondent F	<i>"I also think it'll become very much more about the kind of digital partnerships that are established, so maybe seeing those traditional partnerships evolve to be about how people interact with the digital world around them. So, whether that's about voice technology and working with Amazon Echo to integrate NHS skills into the voice technology that now exists or whether that's about having preferential treatment when it comes to people searching for health things online and being about to point to the right types of products and services that people should be shopping for"</i> (Interview 17)
PHE respondent G	<i>"this whole new evolution in digital...it's got to be the way forward and we've got to get some clarity on what does a partnership in the digital world actually look like?"</i> (Interview 18)
PHE respondent E	<i>"the tech sector's changing so rapidly, not sure whether the traditional partnership model really fits this and it's understanding,</i>

	<i>therefore, how we activate something meaningful with the tech sector that can affect you know, some of the big public health agenda items” (Interview 16)</i>
Partnerships agency respondent D	<p><i>“I think one of the biggest shifts I’ve seen is the move to digital, which impacts social marketing, marketing generally as an industry. From a Public Health England perspective that customer journey has changed across a number of our campaigns. Which has meant that the way in which we work with our partners has needed to evolve over time. So how do we best support partners in activating the campaign message in digital and social channels”</i></p> <p><i>“so how do you best engage people where they are in a digital and indeed social platform has hugely changed in the six years. So how do we go to where the audience is and how do you best engage them when people have less and less dwell time?” (Interview 19)</i></p>
Partnerships agency respondent D	<i>“Stoptober is a great example of that because all smoking cessation over time has massively changed. So, we moved from Quit Kits that were physical kits that we made available in pharmacy, and a call to action around the campaign was driving people to pharmacy to pick up a Quit Kit to help them in their quit journey. We don’t do that anymore...now it’s how do you engage smokers in the digital space that they’re in, in the social networks they’re in. And so that has evolved what kinds of partners we work with” (Interview 19)</i>

Data Source	Findings – Resistance to partners
PHE respondent A	<p><i>“against quite a lot of resistance actually. I think what was traditionally viewed as the enemy, like, you need to have them in the tent. And I think they did that even in the face of some quite significant resistance. Because I think there was a lot of resistance, particularly from health professionals”</i></p> <p><i>“there’s been quite a significant shift around partnerships”</i></p> <p><i>“it’s become much more acceptable and understood why an organisation like PHE would work with, what has traditionally been seen as, like, the bad, the bad commercial brands. Or just bad commercial world” (Interview 1)</i></p>

PHE respondent C	<i>"we've potentially been pursuing partners that the public health community might raise an eyebrow at. So, the people who they see as creating the very problem we're trying to solve" (Interview 14)</i>
Local authority respondent C	<i>"a lot of my colleagues are very suspicious of the private sector. And I think that's quite a common thing in the public health community to be quite honest" (Interview 10)</i>
Local authority respondent E	<i>"I presented to all the GPs in X yesterday. And they said to me, oh, the real problem is Councils need to stop them building takeaways everywhere and fast food chains. And, you know, my response to them was actually you need to understand how people live their lives. And you can't change it like that. What you have to do is try and give them the choice and, and it's great for me to be able to say, actually, the 400/600/600 campaign, the partners you've got on board there, this is how people live their lives. These are places they go to that we want to reach. So, I think it's brilliant that you can reach into those companies, so I think you, you understand the people, understand where they go. Actually, they're the people you need to be on-board with" (Interview 20)</i>

Data Source	Findings – Budget cuts
Observation notes	<i>Partnerships asked to do more as budgets are cut</i> <i>Government decisions – change in priorities – budget cuts</i>
PHE respondent C	<i>"we have a programme that started out with attracting value in client investment from commercial partners to boost marketing budgets" (Interview 14)</i>
PHE respondent E	<i>"we have got a limited budget for our campaigns but actually lots of our partners are out there all of the time, talking to people about their health or about how we're eating, that increasingly we're looking to a more agile model of partnerships which is about us amplifying when the partner's doing something rather than the partner amplifying when we do something"</i> <i>"it's really hard to pinpoint when it actually changed, isn't it, when you think about it. I guess we've just learnt as we've gone. I mean, I think there were some very, very deliberate decisions we made</i>

	<i>that were a result of budget challenges back in 2010/2011 when clearly, you know, we went from £X million worth of public health marketing budgets down to sort of £X million which is where we are now. But actually, you know, it requires you to think more creatively about how you delivered things” (Interview 16)</i>
PHE respondent F	<p><i>“I think particularly in light of, you know, diminishing budgets for marketing, um, we certainly couldn't achieve the same reach as we do working in partnership”</i></p> <p><i>“I think it's evolved in the sense that we no longer see things, um, you know, in the sense that you have to just do it on a in kind basis. So, I think we're very much now looking towards solutions where we can either co-fund or get additional funding to support campaign areas where budgets are particularly tight” (Interview 17)</i></p>
Partnerships agency respondent A	<i>“What partnerships allow us to do is broaden communications, target more people than the marketing budget would allow, broadens range and reach of a particular message” (Interview 2)</i>
Partnerships agency respondent B	<p><i>“the economic climate means that we need to lean more on corporates to promote a pro-social message, and actually more corporates are interested in doing that, so it's a way of extending our budgets and being more efficient”</i></p> <p><i>“Extending the budgets. Making the budget work harder”</i></p> <p><i>“I know budgets are retracting” (Interview 5)</i></p>
Partnerships agency respondent D	<i>“budgets have changed over time as well” (Interview 19)</i>
Observation notes	<i>Local authorities – government cuts to funding and public health budget - 2016-17 budget – loss of £X million public health budget for LAs – could be an issue or an opportunity – LAs might cut services or reduce support – alternatively they might see the opportunity to maximise resources by adopting a national brand and signposting to digital support</i>
PHE respondent C	<i>“I don't think that's too, too strong a word, saying unprecedented area of austerity for Local Government and for the NHS, where they're really having to think very creatively about, and that's a</i>

	<i>euphemism, creatively about how to do things with less money”</i> (Interview 14)
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Partnerships Development Process data

Data Source	Findings – Approach to partnerships
Observation notes	<p><i>“partners having a genuine capacity to affect and support behavioural change”</i></p> <p><i>“partners being better placed than PHE to motivate behaviour change”</i></p>
PHE respondent F	<p><i>“In this instance what we talked about was how can we work with partners to develop a campaign that supports their goals and our goals at the same time and match the partners from the beginning and then develop the campaign around the coalition of partners”</i></p> <p><i>“deciding on a programme of work for the next 12 to 18 months and very much deciding then what our priorities should be and how we should continually evolve our partner base and what, what the model should be with those partners” (Interview 17)</i></p>
PHE respondent A	<p><i>“I think they [partnerships] need to drive the programmes much more. I think, if you have the right suite of partners and partnerships, you should then, on the back of that, be defining what the campaigns are” (Interview 1)</i></p>
Partnership agency respondent C	<p><i>“at that point [launch of Change4Life] partnership marketing had been considered a very tactical tool within the marketing mix”</i></p> <p><i>“I think it’s moved from being, you know, tactical to being strategic and to being an absolute core part of the marketing armoury”</i></p> <p><i>“a realisation that actually partnerships needed to be at the core and was a strategic marketing tool as opposed to being on the fringes and a tactical marketing tool” (Interview 11)</i></p>
Partnerships agency respondent D	<p><i>“the forward-planning piece is really important, so in particular with our key strategic partners”</i></p> <p><i>“it’s that forward-planning piece, so we try and have yearly six-monthly, forward-planning sessions, where, within reason, we look to share our calendar with them and they share their priorities and calendar. And we identify those moments going forward. Or indeed if it’s a moment where we could co-create together, we look to explore them together” (Interview 19)</i></p>

Data Source	Findings – Partnerships learnings
DOC2	<i>“We will be using what we have learned about the power of partnerships and community engagement as we evolve the families’ campaign for 2010 and 2011”</i>
PHE respondent E	<p><i>“We’ve evolved and learnt and grown and we understand the commercial sector much better, so I think all of those things have, I guess, driven us to think more creatively about how we do it. So, I don't think there was ever a fixed point where we'd turn around and say like today we're going to do it like this. I think it's been a process of evolution, understanding and getting to understand our partners better and knowing what works. So, I'd like to say, God, we were really strategic and thought it all through, and some of it we did, but it has been an evolution”</i></p> <p><i>“I think the biggest learning for me is you can't turn up to any partner, whether they're a local authority partner, a public sector partner, a charity partner or a commercial partner and present your agenda and assume that everyone is just going to get behind it. You have got to be really thoughtful of how you create something together. So, even if you've got one core ambition, whether that's knowing your numbers or, you know, swapping unhealthy food for healthy food, every single partner is going to want to execute that in a slightly different way that is relevant to how they deliver their own corporate message, or what they might be doing in their own environments at that time, and I think that is probably the biggest learning, If you really want longevity and continuity, you have to work together to find a way to deliver it together” (Interview 16)</i></p>
PHE respondent C	<i>“You have to be able to let go to allow a partner some flexibility to adapt what you have to meet their circumstances. So, when we started off I talked a bit about that distribution model, we had a fairly strict guidelines around what you could and couldn't do with Change4Life or with Smokefree. It would allow very little rein for the local partners to adapt it and make it feel local” (Interview 14)</i>
Partnerships agency respondent B	<i>“I think PHE have developed a highly sophisticated model in terms of developing and serving those partnerships, and by that, I mean the people that work on the team, so people who have got experience and skills in the area, who have got an aptitude for</i>

	<p><i>negotiating, for listening, and also are marketing experts. I think the tenure of people at PHE is extraordinarily long compared to most other organisations. So, I think there's a bit, kind of, corporate memory and, like, really deep understanding of how to make it work"</i></p> <p><i>"I think there's understanding or there's spending enough time understanding what they want to get out of it and understanding their business, rather than it always been an ask. So, you need to create something which is mutually beneficial. I think it's important to have a dedicated account manager , in the same way you would do... say you were a client, and I know that some of the corporate brands are treated as if they're clients, really, which takes a lot of resource and time. I think it's, kind of, being a bit flexible, so understanding that they've got their own agenda about what they want to talk to consumers about or their own health topics that are important, and about understanding what you can offer as PHE which would help them further their own agenda, so that might be spokespeople, it might be insight and data, it might be giving them, sort of, a profile of the partners in a piece of communication. I think it's just, kind of, being aware that it's not... it can't be all take, there's got to be a bit of collaboration and giving there. (Interview 5)</i></p>
Partnerships agency respondent C	<p><i>"It's like anything else; it's about relationships. It's about listening, it's about collaborating. It's about being really honest and open"</i></p> <p><i>(Interview 11)</i></p>
Partnerships agency respondent D	<p><i>"recognising there is different roles for partners and they are all valid"</i></p> <p><i>"we found over time that it's quite useful to almost build a joint partnership narrative that really looks to look at both tones of voices of the two. Both that partner organisation and indeed the campaign narrative and how the two kind of come together" (Interview 19)</i></p>

Data Source	Findings – Partnerships model
PHE respondent E	<p><i>"you know from the outset we were just, you know, let's just get as many partners as possible. You know, eight or nine, ten years ago it was like, you know, please come and do, you know, join us in this</i></p>

	<i>but now I think we're much more sophisticated in that we've got established relationships, so our model has changed in terms of the mapping process" (Interview 16)</i>
PHE respondent C	<i>"when I joined the partnerships team all those years ago, it felt like my model was very much about shoving stuff out the system. Now, as we've touched on before, some of those partners are coming in-house to challenge our thinking and to help shape plans" (Interview 14)</i>
Partnerships agency respondent B	<i>"it's changed quite a bit over the years – so back in the early days it was more about trying to access channels that you could apply a defined message and all we wanted to do was to get that, the message we'd already agreed, into as many channels that were unusual, interruptive, interesting as possible, and we had some quite out-there ideas. Now, sort of, fast-forward ten years, it's much more about leveraging the positive relationship that those brands or organisations have with our target audience, using the trust and credibility that they can provide, to interpret a behaviour change message in their own words through points in time that are highly relevant to getting people to take action." (Interview 5)</i>
Observation notes	<i>Where previously we might have created campaign materials and distributed these through local channels, we now co-create programmes and support local areas to change the behaviours of their populations. We have moved from a model whereby partners amplify our programmes and distribute our messages to co-creating programmes across a breadth of sectors.</i>

Data Source	Findings – Importance of the partnerships team
DOC6	<i>"we are the largest partnerships team in government and work with 214 key national and 70,000 local partners. These partners are the foundation of an approach that supports at risk audiences in making changes to their behaviours day in day out"</i>
PHE respondent B	<i>"Times are changing aren't they. You can see where things might be moving, and our [partnerships] position in the pecking order might be rising" (Interview 3)</i>

PHE respondent G	<p><i>“there’s three big arms to how we organise to deliver the marketing strategy. So, you don’t do anything without deep customer understanding and research and analysis and having a really clearly defined strategy. So that’s the starting point...then we have to invest. So that’s where we create brands and assets, and at the heart of those brands and assets, there’s always flexibility, because they’ve got to work for partners”</i></p> <p><i>“partnerships is a third and equal discipline in the overall marketing approach that you get the strategy right, you create branded assets, and then you try and amplify and leverage as much as you can through partnerships, as well as what you do yourself. It’s not an afterthought, it’s the third equal strand in the overall marketing approach” (Interview 18)</i></p>
PHE respondent C	<p><i>“So PHE’s marketing team is structured around three core activities, the first is strategy planning and insight, so we have very data literate people, who are getting right under the skin of our audiences, the challenges that they’re facing in everyday life and how that maybe pushes against the healthy behaviours that we want them to adopt. So, they’re understanding the barriers and therefore thinking about increasingly creative ways that we can shift people into a healthy lifestyle, for evaluation as well, because that’s the data they’re working off. Then, the output from that team is potentially a strategy about how to achieve the business objective we’ve been given, which is then taken by the campaign activation or marketing activation teams. So they will work within their brand, they will always have a sense of the brand values, so for Change4Life, for One You, it’s not about preaching, it’s absolutely about reflecting what families recognise so it resonates with them. And they’ll create a campaign and then the partnerships team, we’re about taking those campaigns and exploding them out” (Interview 14)</i></p>

Data Source	Findings – Structure of partnerships team
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PHE respondent D	<p><i>“our partnerships staff are significantly different to other marketing colleagues. If you look at our skill set, there is a clear need to be able to build those relationships”</i></p> <p><i>“I think you need to build a skill set that can cope with the uncertainty of managing partnerships, that you don’t have a complete grip on it at all times, that you are a sales person to some degree, and, so there’s a bit about the workforce that is different. But you still need that understanding of marketing, the organisational skill of getting campaigns out the door. We’re very aware of our channel, our partner channel, our partner relationship”</i></p> <p>(Interview 15)</p>
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Data Source	Findings – Approach to prospective partners
PHE respondent A	<p><i>“Firstly, have to identify where you think there is that mutual benefit.”</i></p> <p><i>“It’s being clear about that mutual benefit. And I think it’s also being clear about where the red lines are. And I think it’s being clear about that up front. So, there’s no surprises later on. And I think it’s also really, really important to be flexible. I think, like, having a very rigid approach is just not possible. And I think that consistency as well. So, I think it’s that really clear objectives, but also what’s just a no-go from both sides”</i> (Interview 1)</p>
PHE respondent D	<p><i>“then you go and meet that partner and start to effectively sell in the campaign and do your due diligence make a clear offer for how it would help and support their business or be that local authority, NHS, you know, or commercial partners, say this is the benefit to you of this campaign that we’re delivering. There’s a bit of, you know, internal lining up of that, so you have to do that before you go out, I suppose, and there is a bit of cold calling where you don’t have those existing relationships and starting to work out those new thoughts can be quite challenging at times”</i></p> <p>(Interview 15)</p>
PHE respondent F	<p><i>“From scratch, I guess it’s a long process. You know, it takes months, to be honest. So, if it’s a completely new relationship and it’s something that you decide is a strategic relationship, that can</i></p>

	<i>take up to a year, if not longer, to develop, depending on what the situation is. In other cases, it can be established and up and running within three months and I think it really does vary, depending on the relationship and the situation.” (Interview 17)</i>
PHE respondent E	<i>“Okay, it goes back to what I think is now the 70/30 model, which is, you know, us turning up with our agenda or identifying the partners that can align with that to some degree or, you know, or 100%. And then the other bit is what’s their agenda, which might be something we are not investing in significantly but it’s important to us from a public health perspective where we can amplify what the partner is doing” (Interview 16)</i>
Partnerships agency respondent D	<i>“So, it often works best when you actually kind of have a workshop session. We found over time that it’s quite useful to almost build a joint partnership narrative that really looks to look at both tones of voices of the two. Both that partner organisation and indeed the campaign narrative and how the two kind of come together. You really just look at a campaign narrative, often, as we develop it with PHE, sets out a problem. The health issues that it’s looking to address. So, what’s the big health issue? By dealing with this issue, what are the short- and long-term health conditions that you could look to address, and therefore what’s the simple thing that we’re asking people to do? And then a call to action at the end. So, what you look to do is... with that campaign narrative that you’ve built already, what is the role of the partner within that and where can their tone of voice and indeed their role be integrated into that? So, it really looks like it’s a coherent and integrated piece. And that often helps just to act as a bit of, it’s not usually right first time, but it helps to aid the discussion as to what is the partnership ambition, for both parties. And the narrative helps to articulate that and helps to act as a kind of platform by which you then look at the customer journey and the channels that could support the ambition. So, the workshop often is in a few different parts. But you look at the overarching ambition, you look at the customer journey, and you look at the channels that could support it” (Interview 19)</i>

Data Source	Findings – Creation of partnerships (commercial)
PHE respondent C	<i>“when you do that partner mapping, you could end up with thousands of touchpoints, obviously, and then it's a process of refining and refining and refining that list so that your listed partners you're seeking are the ones that potentially could have the most impact with that message” (Interview 16)</i>
Partnerships agency respondent D	<i>“There is a step-by-step process. The first thing that we do is a touchpoint map. So, for example, you identify the target audience and you actually do a touchpoint map that identifies...throughout their day, what are the various opportunities they have to engage...so where do they go in their day and what do they engage with...and so, as a result of doing that kind of day in a life, you start to identify what organisations they engage with at each of the touchpoints...you then do a long list of who are the partners...so the touchpoint map is the first thing, and that allows you to identify partner categories that you would then develop a long list of potential partners from. Because that is a long list and you can't work with all those organisations you look to develop criteria by which you shortlist and prioritise those organisations that you'd wish to work with. That varies depending on the kind of campaign that you're working on and the objectives of the campaign. A useful way of shortlisting is by reach, relevance and impact” (Interview 19)</i>
Partnerships agency respondent D	<i>“when the partner-mapping piece is done, the shortlist identified, we would then look to meet with all those partners”</i> <i>“you actually start with a workshop session” (Interview 19)</i>
Partnerships agency respondent C	<i>“the temptation, all too often, I think was for people to go in and go let me tell you what I've got to sell you today”</i> <i>“I think one of the things, challenges, all the time is to say to people when they put their agendas together for partnership meetings, let the partner speak first. You know, because that's the key. You really need to understand their aims, their goals. Your aims and your goals look for where the overlap is. You know, that's the sweet spot. That's where you'll get the maximum value from the partnership. And you genuinely have to co-create to be successful” (Interview 11)</i>

Partnerships agency respondent D	<p><i>“we found over time that it’s quite useful to almost build a joint partnership narrative that really looks to look at both tones of voices of the two. Both that partner organisation and indeed the campaign narrative and how the two come together”</i></p> <p><i>“a campaign narrative sets out a problem, the health issues that it’s looking to address. So, what’s the big health issue? And what’s the simple thing that we’re asking people to do? And then a call to action at the end. So, what you look to do is with that campaign narrative that you’ve built, what is the role of the partner within that and where their tone of voice and indeed their role be integrated into that? So, it really looks like it’s a coherent and integrated piece. And that often helps just to act as a bit of, it’s not usually right first time, but it helps aid the discussion as to what is the partnership ambition, for both parties. And the narrative helps to articulate that and help to act as a kind of platform by which you then look at the customer journey and the channels that could support the ambition. So, the workshop often is in a few different parts. But you look at the overarching problem, you look at the customer journey, and you look at the channels that could support it” (Interview 19)</i></p>
Partnerships agency respondent B	<p><i>“I think you, kind of, have a piece up here, like a headline, this is what our partnership means, a bigger, kind of, stated objective which should be long-term, you know, two or three years, and then I think underneath that, you can have a bit of evolution of messaging” (Interview 5)</i></p>
PHE respondent A	<p><i>“make sure that your governance is set up right. And governance comes in lots of different ways. But I think the formal agreement piece, whether it’s legal or MOU [memorandum of understanding] that sets out how, you know, what happens in the case of anything going wrong. It sets out all those structural pieces as well. But I think critically as well, it also sets out what will happen, like what the process is for when something goes, if something’s not working. Or there’s a question about a brand issue. Or like, it sets out clearly what will happen and who the decision makers are. So, I think that governance piece is the bedrock of any long-term partnership” (Interview 1)</i></p>

Partnerships agency respondent C	<i>“the technical management bit is making sure you’ve got good governance around the partnership and partnerships generally, so people are clear about what is expected of each other in the partnership, that there are clear mechanisms if the partnership goes off-track. You know how that would be tackled” (Interview 11)</i>
Partnerships agency respondent D	<i>“as to what the governance is required. But there are certain things you would need to put in place, in particular where you’re working with strategic partners, to protect both partners. So, there is often something like a terms of engagement or memorandum of understanding that sets out a gentlemen’s agreement. It’s not a legally binding document, but it sets out some principles that both parties will work to” (Interview 19)</i>
PHE respondent G	<i>“we were quite rigorous at the start, and we had a really clear terms of engagement, and it was about partners basically using our collateral and our brands to amplify our campaigns. And that was all done to a clear set of principles, clear set of guidelines. And I think, as we’ve grown and as we’ve become more flexible, or market circumstances have become more flexible, to the extent that, you know, partners can take a brand and run their own initiative, without us having a campaign going on” (Interview 18)</i>
Partnerships agency respondent B	<i>“being a bit flexible, so understanding that they’ve got their own agenda about what they want to talk to consumers about or their own health topics that are important, and about understanding what you can offer as PHE which would help them further their own agenda, so that might be spokespeople, it might be insight and data, it might be giving, sort of, a profile of the partner in a piece of communication” (Interview 5)</i>
Partnerships agency respondent B	<i>“a steel fist in a velvet glove”</i> <i>“I think the velvet-glove stuff is that you invest in a relationship, understand each other’s aims, build personal relationships, and I think in partnerships that’s really important. It’s not just about an organisation to an organisation, it’s about individuals, and that’s why PHE’s consistent team is so important, but I think within that, you need to have a defined set of requirements or memorandum of understanding or contract, whatever you want to call it, which is the</i>

	<p><i>absolutely, this is not negotiable. So, we need to be able to protect the PHE brand and everything that it stands for</i></p> <p><i>“creating an MOU which is proportionate” (Interview 5)</i></p>
PHE respondent C	<p><i>“the process of partnerships often as you’re creating them starts with something quite small to, kind of, test out each other’s commitment to the partnership and how things might work. Because if you start from a very global macro perspective of this is what we will achieve together, sometimes it’s very difficult to actually get that moving. So, you’ll start off with something quite small and gradually build”</i></p> <p><i>(Interview 14)</i></p>
Partnerships agency respondent A	<p><i>“What we first did with them was a bit of a... well, I guess it was a pilot, really, so we worked with them on Smart Restart which was a back to school kind of email support programme, really, which was trying to tap into that back to school moment where people kind of start to reset, and it’s almost like a New Year’s resolution kind of time period. So, we worked with them on that. And, you know, that was fine, it was quite small scale as, like I say, a pilot”</i> (Interview 2)</p>
Partnerships agency respondent C	<p><i>“I think it is a good exemplar because that partnership started with a little pilot on something called Smart Restart, a little piece of digital activity”</i></p> <p><i>“Yes, there was an element of risk and that’s why we went into a pilot to start with which was to just, sort of, see how the relationship could work. So, it started with Smart Restart, which was effectively a digital partnership”</i></p> <p><i>“And there were lots and lots of learnings out of Smart Restart including how we would and should work with [partner name], going forward”</i> (Interview 11)</p>
PHE respondent G	<p><i>“It’s about maintaining and sustaining the relationships that we’ve got, which is incredibly difficult to keep, just even to keep things fresh and to keep people motivated and come up with fresh ideas. So, it’s a big challenge. I think it’s about growing the kinds of partnerships that we have”</i> (Interview 18)</p>
PHE respondent E	<p><i>“we’ve evolved and learnt and grown and we understand the commercial sector much better, so I think all of those things have, I guess, driven us to think more creatively about how we do it. So, I</i></p>

	<i>don't think there was ever a fixed point where we'd turn around and say like today we're going to do it like this. I think it's been a process of evolution, understanding and getting to understand our partners better and knowing what works" (Interview 16)</i>
Partnerships agency respondent B	<i>"there are different ways to create a win-win partnership and I think PHE are probably at the cutting edge of that and I think have done way more to further it as a marketing science than anybody else, and I include brands in that. I don't think anybody's as sophisticated as the model that they've got going there. And I think there was always a bit of test and learn"</i> <i>"so, I think it's taken us, sort of feeling our way to understand what's going to motivate partners to engage, and we're much more nuanced now than we used to be. You offer partners a means to add value to their customers in a way which is really important and meaningful, and I think that's really authentic. I think that's outside of any economic gain, financial gain" (Interview 5)</i>
PHE respondent C	<i>"To those organisations [Local authorities], so, necessarily we have to initially start off with a broadcast to explain again what the, absolutely what the campaign objectives are, what the target audience is, do a fair amount of demonstrating that we understood the target audience so that the people that we're talking to have confidence that whatever we're going to provide is going to appeal to their audience, their own audiences and help them achieve their objectives" (Interview 14)</i>
PHE respondent A	<i>"There are two bits. There's the ones that are, sort of, like, we're going to have a round table meeting or we're going to have our three monthly meeting with all the people. And that's obviously a really structured, kind of, approach. But then I think there's just the more ad hoc stuff that happens" (Interview 1)</i>
Partnerships agency respondent A	<i>"it depends on the kind of level of partnership that we have, so, if it's, you know, kind of a key partner, a key strategic partner, it's regular face-to-face meetings. We feel as if we've got a lot more out of the regular face-to-face meetings. However, we can't do that with all the partner relationships that we have. So, you rely on email quite a lot, and kind of communicating in that way. There's even kind of... you guys do kind of newsletters a lot more than we do so that's a very,</i>

	<i>kind of, easy way to communicate out kind of important facts to a wide range of partners such as local authorities and things like that” (Interview 2)</i>
Local authority partner respondent B	<i>“actually, that’s another positive about PHE is the, kind of, proactive sort of stuff that you do. The campaign resource centre, I think is brilliant” (Interview 7)</i>
Commercial partner respondent D	<i>“The openness and the honesty, and the willingness to learn from mistakes. That’s why I’m saying sometimes it comes to people” (Interview 12)</i>
Commercial partner respondent A	<i>“Just openness, honesty, making sure that there’s mutual conversation at every step of kind of the planning of the campaign and making sure that things are improved” (Interview 8)</i>

Data Source	Findings – Creation of partnerships (public sector)
DOC8	<i>“Over the past three years, we have developed an increasingly sophisticated model for engaging with local areas. We create branded programmes that local areas can use to engage their populations, to communicate healthy behaviours and even as a platform for commissioning services.”</i>
PHE respondent B	<i>“It’s much looser in local government. There’s no MOU in terms of exchange of resources or budget, and actually we’ve deliberately resisted that” (Interview 3)</i>
Observation notes	<i>“looking at a new way of working with LAs” “working towards a public sector partnership model to support localisation of national campaigns”</i>
PHE respondent C	<i>“if I think about our local authority model, that’s having to move with the times, we talked about austerity and cuts that these, a lot of the marketing activity that local authorities maybe did before is now being outsourced to commercial providers” (Interview 14)</i>
PHE respondent C	<i>“some of the partnership work we did there was quite new to us, so we did a lot more co-creation with the public sector than we’ve ever done before. And I think because we take a small representative group of local authorities into our coterie, if you like, what we’ve</i>

	<i>ended up with is much more flexible that really meets local needs” (Interview 14)</i>
PHE respondent D	<i>“actually, what has created the strength there is that partners were brought in and have become an integral part of the learning process of the campaign team. So as 25-30 local authorities come in and say this is what we would like, and we are now using this (One You) as our key health strand for this age range. That gives us real clout with the campaign team” (Interview 15)</i>
Local authority respondent B	<p><i>“I think One You was quite a good example in the sense that there obviously was all those preliminary, kind of, groups where actually local authorities were invited to be part of the, kind of, shaping element of it. And there were certainly some, kind of, wins. Like I say, you know, postcode was a factor that’s, kind of, rolled into the How Are You quiz, which is essential for us”</i></p> <p><i>“when I first came into post the, sort of, initial understanding of the campaigns was very much it all, kind of, came packaged up and here it was and it got, kind of, handed and it was, like, here’s some, you know, things for you to use locally. I’d say that with the example of One You, that’s the first, kind of, piece of activity where local authorities, you know, there’s that, kind of, group set up to involve us from a, kind of, really early stage in the, kind of, shaping and developing of that and how it was used locally and how it’s going to be developed and that kind of thing. So, I think that was a really, kind of, beneficial thing”</i></p> <p><i>“with One You, there was obviously, sort of, a group of local authorities, you know, ten, twelve, whatever it was, were, kind of, involved in that” (Interview 7)</i></p>

Data Source	Findings - Risk
PHE respondent A	<i>“You need to, kind of, look at their reputation. Risks. I think... I think the big ones really are reputation. The other risks are really, I think, mostly about partners not delivering or Public Health England not delivering. So non-delivery on both sides is always a really tough one” (Interview 1)</i>

PHE respondent B	<i>"I suppose if you enter into a public partnership with people, you're tied to their reputation and their behaviour. You also got this issue with control. You can't tell people what to do. You have got to negotiate all the time. So that's really hard"</i> (Interview 3)
PHE respondent C	<i>"So, the risks, for what, corporate reputation I suppose and that's probably most likely where we have got commercial partnerships. And particularly from, we work in the public health community where you often have purists who don't feel we should partner with particular types of organisations"</i> (Interview 14)
PHE respondent E	<i>"I mean, it can go wrong. I guess the risk is, particularly when you're talking about health, is that because a lot of the partners that we work with, the retailers, the manufacturers, for example, especially on food are, you know, for as much as we're promoting health, they are also selling unhealthy products, promoting unhealthy products, and so there is a degree of risk in that you can be really, really criticised for working with a major retailer and manufacturer that has those products in its portfolio."</i> (Interview 16)
Partnerships agency respondent C	<i>"Well, there's a massive risk around bringing the campaign into disrepute which could happen in a number of ways"</i> (Interview 11)
Partnerships agency respondent D	<i>"we often, through that identification of partners, look to mitigate some of those risks as part of that mapping piece. So with, through the prioritisation, you are looking at the credibility at the organisation, and through that is ensuring that Public Health England isn't necessarily aligned to any organisation that has had any previous issues that would bring Public Health England into any disrepute by working with the organisation. So, the relevance piece needs to be not only is it credible that the organisation kind of carries our campaign messages. But also, that from a press perspective or from the way that their governance and their operations are conducted, that that is in line with what government should be kind of aligned to or kind of can sit alongside. So, some of that risk</i>

	<i>mitigation should happen up front. But also, through working through a terms of engagement or a memorandum of understanding, it helps to mitigate risks” (Interview 19)</i>
Commercial partner respondent A	<i>“number one there’s a control thing isn’t there. So, I think, you know, from a PHE perspective obviously the risk comes to ultimately how much can you control the end voice to those, the people that you benefit” (Interview 4)</i>

Data Source	Findings – Long-term partnerships
DOC7	<i>“a new strategic partnership with Disney, which brought a fresh new angle to the physical activity campaign and led to a long-term strategic partnership with C4L [Change4Life]”</i>
PHE respondent D	<i>“So, with a long-term partnership, I think you can build some of that depth. Once they are used to you, you are both used to each other’s ways of working, so that we get better at meeting their needs and they start to understand our capacity to deliver and, you know, sometimes our limitations and, you know, and how to get the best out of us for what they want. That also really helps build and improve the outputs for both parties, really” (Interview 15)</i>
PHE respondent B	<i>“Longevity is very useful because it means you don’t have to set things up every time, do you?” (Interview 3)</i>
PHE respondent E	<i>“I suppose a really good example of that is [partner name]. So, if you're going to have any kind of credibility, you can't just turn up one day and say, right, this is what we're going to do today and we're going to do it for a couple of weeks and then we're going to walk away. Because I don't think there's credibility in it on either side there. So, I think... Trying to change people's behaviour can't happen overnight, so therefore your partnership should not just be an overnight thing” (Interview 16)</i>
PHE respondent G	<i>“Obesity needs long-term partnerships and there are ready-made players who can influence the childhood obesity agenda, and it’s the supermarkets and it’s the food manufacturers, and it’s the drinks manufacturers. So, you have to try and aim to</i>

	<i>keep some long-term relationships going there, and that's difficult to sustain it" (Interview 18)</i>
PHE respondent A	<i>"I mean, for me, partnerships are all about relationships essentially. And it takes a long time to establish the trust required for a really long-term relationship" (Interview 1)</i>
Partnerships agency respondent A	<i>"a partnership is based on relationship building and you get a hell of a lot more out of an organisation if you've had time to build that relationship. So, you just get a better quality of relationship when it's a longer-term relationship"</i> <i>"So, you're more likely to be successful in what you're trying to do if you have a longer-term relation, because you get to know each other a hell of a lot more" (Interview 2)</i>
Commercial partner respondent D	<i>"We build on it every year, so every year we come with a successful programme and then we say how are we going to make it even better next year" (Interview 12)</i>
Commercial partner respondent B	<i>"I think, once you have a credible partner, that credibility only grows within the consumer eye. So, longevity is actually really important"</i> <i>"you've been on that journey together, you've got learnings, you know what happened in the past campaign, and you've got the knowledge of each of the organisations and how they work" (Interview 8)</i>
Commercial partner respondent C	<i>"the fact that we've gone through it before should have the advantage that it's not all new"</i> <i>"I think it's long-term strategic partnerships on big issues such as eating healthier, stopping smoking" (Interview 9)</i>

Data Source	Findings – Maintenance of partnerships
PHE respondent A	<i>"But I think the real, kind of, work has actually been in maintaining that over the last seven years. Because it takes a lot of work to do that. And it takes a lot of, kind of, maintenance of that relationship. And I think there's, kind of, two bits. There's, kind of, probably two or three bits to that. I think there's just general relationship building and the, you know,</i>

	<p><i>treating them like the client. And keeping them, kind of, involved. And then there's just, again, being really clear and recalibrating every year about what are the objectives that we're trying to achieve, both together and separately in any, in any, sort of, partnership that we develop. And then I think trying to find new ways to keep it fresh as well"</i></p> <p><i>"And then there's this, sort of, stuff around evaluation and reporting. So, making sure that you're feeding back success stories. And also looking at where things haven't gone quite so well" (Interview 1)</i></p>
PHE respondent F	<p><i>"and then it's maintenance, really. I think, you know, it's... then you go, well, once you then establish that you both want to work on the same thing, you go into campaign creation and co-creation and that's very much about a series of workshops, coming up with a sort of strategic idea that can hold the whole partnership together and then working on the tactics that would end up delivering it to the consumer" (Interview 17)</i></p>
PHE respondent E	<p><i>"Anyone can join in the party if they want to but that doesn't mean they have to be actively managed but we now have like this key relationship management model so that we have identified the top sort of ten, twenty partners who have the most impact, are potentially investing the most amount of time and energy or have something on their corporate agenda that, you know, aligns to what we're doing. And they're the ones that we really day to day manage really intensely and closely, so people like X and Y, and then you've got a kind of middle tier of those who are very active and, again, don't require day to day managing but, you know, where we've got really intense relationships they do, they do need managing because they need to understand where we're going, what we're doing and you need good personal relationships as well." (Interview 16)</i></p>
PHE respondent C	<p><i>"So, that's a longer-term relationship, but it takes quite a lot of maintenance and checking in that it's still delivering what we need on both sides. It does mean however that you get a deeper and more meaningful, more impactful level of activity. But there is also, I think with long-term partnerships you do</i></p>

	<i>have to keep checking in and saying is this delivering what we both need, are we still achieving what we set out to do”</i> (Interview 14)
Partnerships agency respondent C	<i>“How do you continue to refresh it? I think that’s about continuing to work in a co-creation way, capitalising on new developments, whether that’s new licences, for example, of franchises and releases that X have. So, you’re bringing new content, always new content, into the partnership”</i> (Interview 11)
Partnerships agency respondent A	<i>“so, in terms of how we maintain that relationship, it’s regular management. So, there is, you know, regular check-in points, we meet them probably every quarter, and we just generally keep each other kind of updated with things that are going on which we think they might be interested in and they think we might be interested in as well. So, there’s kind of our day-to-day contacts, who are the ones that kind of, you know, do the doing, do the delivery for us; but then it’s really important, particularly for their longer term relationships, is actually to ensure that we’re talking to quite senior people over there . So, we do a bit of man marking you can call it.”</i> (Interview 2)

Data Source	Findings – Trust
PHE respondent D	<i>“there is something intrinsically trustworthy for a public-sector NHS colleague, I think, about another public-sector colleague going to see them with a clear offer that meets their needs and has a rationale behind it”</i> (Interview 15)
PHE respondent C	<i>“So, I think trust is built by being as honest as you can be”</i> <i>“So, building that trust, I think there’s a lot of integrity as well, so I know a lot of the team feels like they have a responsibility to respond to their partners, and they see them very much as clients, so having that respect. So, they feel they’ve got to give good customer service”</i> (Interview 14)
PHE respondent F	<i>“It’s hard to pinpoint how you establish the trust. I think it’s definitely about openness and honesty whilst also realising and recognising being able to adapt how you work according to</i>

	<i>what other organisations and individuals expect and want”</i> (Interview 17)
PHE respondent A	<i>“you just have to be really, really good at informal relationship management. I think you just really need to be building that trust”</i> <i>“So, I think it’s that really clear objectives but also what’s a no-go from both sides. And sometimes those things just crop up as you go along. But I think that’s the best way to build trust”</i> (Interview 1)
PHE respondent E	<i>“I think it’s based on personal relationships and that... you know, and having that really close contact, and us as the marketing partnerships team being open and trusting the partner to get, you know, advanced information about what it is we’re doing, really into the detail. And then it’s us trusting them to then take that and deliver it. So, there’s a relationship, you know, a personal relationship management piece”</i> (Interview 16)
PHE respondent G	<i>“I think it’s always about delivery first of all, isn’t it? In terms of being able to say to people, you know, this is what’s happening, and it happens, and that’s important. But also listening. Uh, from both sides. Yeah, like everything, it’s about recognising each other’s challenges and priorities. That’s always the hardest thing in terms of working your partners”</i> (Interview 18)
PHE respondent B	<i>“I think a lot of the trust is very twofold, it’s based on pre-established relationships and understanding, you know, what we do as an organisation. And then secondly through doing it, through delivering it and proving that we are capable of delivering the intended outcomes”</i> (Interview 3)
Partnerships agency respondent A	<i>“I think it’s a given actually, that there is that trust there. You know, we represent government when we go in and talk to partners. It might be a little bit naïve but we kind of assume that, you know, they’re working professionals and they are going to do what it is that they have said that they’re going to</i>

	<i>do in the way that, you know, we want them to do it” (Interview 2)</i>
Partnerships agency respondent C	<i>“It comes from being collaborative. About being open, honest, keeping communicating, doing good work, sharing the impact and the efficacy of that work. And not dipping in and out. You know, that’s one of the worst things with partnerships, you know, you can’t turn partners on and off so when times are really tough and, you know, budgets have been pulled or policies have been changed and campaigns have been pulled and, you know. It’s unavoidable, the worst thing you can do is just bury your head in the sand and, you know, you just need to be out there telling them what’s happening, why it’s happening, you know, trying to work through it with them. Again, it’s about being really honest. That is absolutely the, sort of, key” (Interview 11)</i>
Local authority partner respondent A	<i>“I think if you didn’t have that kind of trust or respect or kind of view that PHE was the place to go, then you might view it differently” (Interview 6)</i>
Local authority partner respondent B	<i>“I think that in a way it is the people, you know. So, I guess it’s that weird thing in terms of, like, trust with PHE, it all comes down to personal relationships, doesn’t it, so actually, it’s the interactions you have on that level that enable you to, kind of, build the trust with your organisation” (Interview 7)</i>
Local authority partner respondent C	<i>“I think it’s been through that openness to involve us in development. And it influenced the campaign, so that to me has built trust. And the fact that you actually deliver what you say you’re going to deliver. But generally, I think you say we’ve got this campaign coming up, and you deliver what you say you’re going to deliver so that builds confidence and trust. I think inevitably it’s about relationships” (Interview 10)</i>
Commercial partner respondent C	<i>“We’re looking for people who can deliver. And that’s what the trust is. We’ll get it into our plan in December. And you make sure that by October, you’re delivering the logos and delivering on the things, so that we can start designing our leaflets and our point of sale material for January. And you deliver to the</i>

	<i>timetable and you always do that, so we trust you to do that. And it works” (Interview 9)</i>
Commercial partner respondent B	<i>“You know, they’re very trusted and credible within the health arena. It’s where our core consumers go for any health... people still want that trusted source of advice and recommendation. And that is Public Health England” (Interview 8)</i>
PHE respondent A	<i>“There’s trust with the target audience that that partner has. We monitor the trust between the target audience in that organisation” (Interview 2)</i>
PHE respondent C	<i>“getting over maybe lack of trust in the Government or scepticism about Government delivery of a particular message” (Interview 14)</i>
PHE respondent G	<i>“One is the way that you influence people and their... people’s lifestyles and their health is via the real brands that they reach and touch and trust every day in their lives, so hearing a message and an offer from X about healthy eating may well be more motivating than hearing it from a campaign or even from a government funded body. So, the criticality of the messenger and the contextual opportunities that they have to talk to people about health and lifestyle is critically important” (Interview 18)</i>
Local authority partner respondent B	<i>“the Council employs 3,000 people and they touch our residents’ lives on a daily basis, you know, through, as I’ve said, housing offices, benefits offices, people that run the libraries, our health visitors, all these different people they’re out there. And a lot of them have got the trust of our residents as well, some of our really hard to reach groups, have a great relationship with their housing officer, or have a very good relationship with their health visitor or whatever. By going through those channels, we can get stuff to them and get them to take on a message better than they would just seeing a TV ad or something else” (Interview 8)</i>

Data Source	Findings – Future commitment
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Partnerships agency respondent D	<i>"So, the fact that X has supported us for... I think we're coming into our fourth or fifth year. I think is cognisant of the fact they wouldn't do that if there wasn't a successful outcome from their perspective of working with us in a campaign" (Interview 19)</i>
Commercial partner respondent B	<i>"I think it's something that can only grow. I just see us, you know, continuing to get even closer in terms of planning and looking at strategy, looking at key health concerns within the nation and driving that message out to expand both of our audiences and make sure that people are getting the best healthcare and well-being that they possibly can and alleviate pressure through prevention of pre-conditions through self-care and pharmacy-led advice" (Interview 8)</i>
Commercial partner respondent D	<i>"And we think and we know that actually we want to continue the journey for the children. So, they come back from the school, from the break at school now in September had we continued the journey... You know, we managed to help them stay active in the summer, you know, why not continue with them to continue with this activity throughout." (Interview 12)</i>
Commercial partner respondent E	<i>"Hopefully to continue. As I say I think we have got a really, really good working relationship" (Interview 21)</i>

Outcomes data

Document Name	Findings – Measurement of outcomes
Changing Behaviour, Improving Outcomes – a new social marketing strategy for public health 2011 (DH)	<i>“commercial sector in-kind contributions for Change4Life grew from £9 million in 2009/10 to £12 million in 2010/11”</i>
PHE Marketing Strategy 2014-17	<i>“partnerships leveraged an additional £75million of in-kind support and generated free editorial and media coverage valued at £37million”</i>
PHE Social Marketing Strategy 2017 to 2020	<p><i>“commercial partnerships have generated over £123million of in-kind support since 2009”</i></p> <p><i>“the partnership with Disney has nudged over a million previously inactive children into an additional 100,000 minutes of physical activity as part of the 10-minute shake up campaign”</i></p> <p><i>“partnerships with grocery retail and manufacturers have helped to encourage shoppers to trial healthier options via money-off vouchers and point-of-sale advertising in 15,000 high street retailers”</i></p>
PHE respondent D	<p><i>“I think we are getting better at evaluation, which I think still trips us up. That there are a whole range of industry-accepted norms for marketing and advertising, TBRs, opportunities to see. But there’s not a partner value metric which we use. Sometimes we don’t get taken as seriously because we can’t then go back and just say, Here’s your PVM for partnerships for this campaign. For every pound spent, we got this many pounds or this reach. So, there’s that importance that we need, to be heard at the table, we need to have that kind of information”</i></p> <p><i>“My partner value metrics would be value, reach, quality. So how much time or money did that partner</i></p>

	<i>put in? How many more people or how many people were reached through partnership? So, what was the additional kind of number of eyes that got to see or hear about the campaign? And then there's quality. " (Interview 15)</i>
PHE respondent B	<i>"No-one knows what those outcomes should be at the moment, and they're changing" (Interview 3)</i>
PHE respondent C	<i>"In an ideal world what we would like to be able to report back is that the investment we've put into the partnership to get things moving, to ignite their activation, has had a return on investment. And you might measure that in terms of, I don't know, media value that partners have been able to generate. Ideally it would be behavioural, so whether that be an app download or, in the case of physical activity, how many extra minutes physical activity have been generated directly by that particular partner, but that's quite difficult to measure" (Interview 14)</i>
Partnerships agency respondent D	<p><i>"Unpicking the impact of that partnership when you're looking at an overall campaign evaluation is really challenging"</i></p> <p><i>"To be able to quantify or measure the impact that working with partners. The level of trust that customers have with those brands and therefore being able to measure what impact that has on a campaign's outcomes is really challenging and difficult"</i></p> <p><i>"there are measures of success like, how many partners have we worked with? how many channels are they supporting in? what level of co-creation have they worked to?" (Interview 19)</i></p>
PHE respondent A	<i>"One of the things that's always been difficult for partnerships, is that it's been really hard to measure. I think we've tried lots of different ways to measure it, but it's always really hard to say... So, you can talk</i>

	<i>about reach and you can talk about some of the outputs. But the outcomes are always quite hard to measure” (Interview 1)</i>
Commercial partner respondent A	<i>“Need more outcome-based measures” (Interview 4)</i>
PHE respondent F	<i>“I think it really will hopefully evolve into a position where organisations with similar interests come together to deliver bigger programmes of activity that are less focussed on a specific campaign and more focussed on an outcome” (Interview 17)</i>

Data Source	Findings – Intangibility of partnerships
PHE respondent A	<i>“I think the big challenge around partnerships is that they are quite intangible. Like, a lot of it's a very intangible relationship and it takes a long time. And it's very hard to talk about. Because the bulk of the work is about relationship, I suppose organisational or personal. It's very intangible and it's hard to talk about what you've been doing. But it's so long-term that it can feel quite intangible” (Interview 1)</i>
Local authority respondent D	<i>“it can be non-tangible, the exchange of either providing content, resources, ideas, support, and that working reciprocally with the other partner as well” (Interview 13)</i>
Partnerships agency respondent A	<i>“I would love to say behaviour change but it's really, really difficult to measure the impact that a partner has on behaviour change, particularly obesity. That's longer term” (Interview 2)</i>
PHE respondent E	<i>“It's really hard to measure behavioural outcomes. I think when you're investing money and you're talking to people, it's really hard to separate out anyway what our behavioural outcome is of Change4Life as a whole programme, let alone the partnerships element of that” (Interview 16)</i>

PHE respondent G	<i>"Where we can measure the specific partnership outcome, then that is the gold standard, isn't it? So basically, the outcome, what can we measure from the partnership? So sometimes it costs more to measure than it costs to do the partnership. I think two good examples of where it can get pulled through into measurement is where we do something with an organisation that collects basket shopping data, and that we can work with them to prove that if somebody is engaged in our communication, their shopping basket changes, as opposed to somebody who isn't engaged. So, where you can pull it through to actual sales data, is fantastic. But sometimes uniquely, they can give us sales and actual measurement data"</i> (Interview 18)
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Data Source	Findings – Outcomes model
Partnerships agency respondent B	<i>"I think partnerships could learn quite a lot from the attribution modelling that media agencies are doing in a non-behaviour change way. It's so difficult to isolate the effect, though, so you have to, kind of, create lines of sight. So, you know, you, kind of, build a hypothesis of the conditions in which you think behaviour change will happen, and then you can measure how the behaviours are changed themselves, but some issues are way easier than others"</i> (Interview 5)

Data Source	Findings – Financial measures
PHE respondent D	<i>"sometimes we don't get taken as seriously because we can't go back and just say...for every pound spent we got this many pounds or this reach. So, there's that importance that we need to be heard at the table, we need to have that kind of information"</i> (Interview 15)
Partnerships agency respondent C	<i>"on average now we're still delivering £Xmillion a year in value to the [Change4Life] campaign. And that is against a backdrop where the investment from the Department of</i>

	<p><i>Health and Public Health England has declined significantly. And that level's been maintained, which I think is really important"</i></p> <p><i>"I think it means that we get much better campaigns, much better products, much better audience engagement, much better insight, and all these things are difficult to put a value on. But, you know, yes, there's huge value in that"</i> (Interview 11)</p>
Partnerships agency respondent B	<p><i>"extending the budget, so making budgets work harder by sharing the load with partners"</i></p> <p><i>"being able to bring the knowledge and expertise of experts, whether they be local authorities or people like X or some brands, being able to bring that knowledge and expertise about our shared customer base to bear"</i> (Interview 5)</p>
Partnerships agency respondent A	<p><i>"I think the partnerships, what they allow us to do is broaden out the communications and target a lot more people than necessarily the marketing budget would allow us to do. So, I guess it gives us air cover and it broadens out the range and reach of the particular messages as well"</i> (Interview 2)</p>
PHE respondent F	<p><i>"There's huge financial value to what we do, really adding to the reach that we achieve through our advertising and to actually getting people to do something in real life, which is an example of behaviour change or, you know, getting towards changing behaviours. I think it brings a real kind of sense of, um, authenticity as well to some of the stuff that we do."</i> (Interview 17)</p>
PHE respondent E	<p><i>"the outcome is, I guess, from X we've started out, you know, there was no cash investment, it was a very small scale pilot and we've moved to, you know, in excess now of £Xmillion of in-kind funding and in excess of £Xmillion in cash funding. That is an outcome that, you know, absolutely supports what it is we're trying to do but also boosts, you know, the campaign investment. So, the</i></p>

	<p><i>outcome, you know, the outcome for us is actually you've turned, you know, £X million investment in physical activity year on year, a £X million campaign in effect, to an over £Xmillion campaign. So, yeah, there are financial outcomes, whether they're cash or in-kind as well as, you know, consumer outcomes"</i></p> <p><i>"Talking about health. So, I think it's clear we are having an impact because if we weren't having an impact, we wouldn't get partners to the table. It's just... it is challenging to measure" (Interview 16)</i></p>
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Data Source	Findings – Change in behaviour of target audience
Partnerships agency respondent C	<p><i>"it's what impact a partner is making in terms of changing behaviour and then you have to look at the evaluations related to individual campaigns"</i></p> <p><i>"you could look at the X partnership and find evidence there that that partnership has increased children's physical activity levels over the campaign period"</i></p> <p><i>"Sugar Swaps in particular – you can look at the data and see that actually, there has been a lot of swapping from sugary drinks to the diet drinks, from sugary cereals to non-sugar cereals, so, you know, the evidence is there on a campaign by campaign basis that contribution of partners is significant to changing behaviour" (Interview 11)</i></p>
DOC8	<p><i>"we worked with Disney to reinvent a range of ten-minute activity bursts (10-minute shake ups), each themed around a Disney franchise. Together we successfully nudged over a million previously inactive children into an additional 100,000 minutes of physical activity as part of the 10-minute shake up campaign."</i></p>
Local authority respondent D	<p><i>"Well I suppose the ultimate outcome is the target group response to the call to action. So, we see people have made that change. And that's sometimes hard to</i></p>

	<i>measure I know, but that's the ultimate outcome"</i> (Interview 10)
Partnerships agency respondent A	<i>"if Public Health England want to influence consumers at the point of decision making in a supermarket, because they've understood that actually to create change, that's where they need to be. And, of course, Public Health England don't operate in supermarkets, so they need to work with a partner to achieve that"</i> (Interview 1)
Local authority respondent D	<i>"ultimately, it's kind of actually delivering some kind of behaviour change and that may be a slight step change towards the ultimate goal, but actually, it's also about building on the evidence base, so local authorities, by delivering national social marketing campaigns and then PHE reviewing that data, contributes to the bigger evidence base of what works and what doesn't work"</i> (Interview 13)

Data Source	Findings – Brand-building
Partnerships agency respondent B	<i>"well, if you buy into the idea that brand-building is a good way to deliver on any kind of ultimate behaviour, which I do, I think brand-building's important, then partnerships can help you build brands. It helps you build visibility, but it also helps you cement in consumers' minds what the brand, whether that's One You, Stoptober, Change4Life, what that stands for. I think actually Change4Life is a great example of where that brand has arguably been built as much through partners as it has through paid advertising"</i> (Interview 5)

Data Source	Building coalitions
Partnerships agency respondent A	<i>"You need a range of partners who are providing solutions to help, you know, provide a solution to that problem. So, I guess that's where the coalition was built. So, we developed a number of relationships with different types of partners from lots of different</i>

	<i>industries. So, there's retailer and grocers, because they are part of the problem but also part of the solution, and physical activity providers such as X and the local authority providers, all have a really important role to play" (Interview 2)</i>
PHE respondent C	<i>"so, creating a coalition where you've got lots of organisations and hopefully you agree on a single position. So, you have a much more single-minded message that's going to the target audience. Because ultimately you all have the same objectives" (Interview 14)</i>
PHE respondent D	<i>"the return on investment is significantly in our favour, given that we get the likes of every single local authority or large parts of the NHS displaying collateral, having those conversations, and X and all the people who support a campaign. If you get that coalition of supporters all delivering the same message at the same time, you have a much more effective campaign"</i> <i>"you piggy-back on the relationship that those other partners have, that otherwise you wouldn't have as just PHE" (Interview 15)</i>
Commercial partner respondent B	<i>"they [PHE] get credibility, but also consumer choice, and when there's a coalition of partners, it tends to touch different points of the funnel" (Interview 8)</i>
Partnerships agency respondent D	<i>"when we work with a coalition of partners, the messaging is more credible as a result. So, there are partners that recognise they're all doing similar work in the same space, but it's kind of the old adage that a group of partners is kind of stronger than one working alone. And so, when you're talking to consumers about a health message, partners even themselves recognise that when we are listed along with our competitors by an organisation such as PHE, it is more credible than being sounded out alone. So that coalition allows for</i>

	<p><i>that credibility of the offering because it's a number of different partners working together rather than one"</i></p> <p><i>"we know that that frequency of message is important in ensuring that there are those nudges towards positive behaviour change. And we can only look to do that through working with a coalition of partners in a number of different ways rather than one partner in one way"</i></p> <p><i>"but then there are also those that we look to within the coalition that will support a particular campaign spike, and we look to try and liaise with them on a one-to-one basis or indeed kind of bring together in a smaller group" (Interview 19)</i></p>
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Data Source	Findings – Data and evaluation
Commercial partner respondent D	<p><i>"we'll go through the planning process, the delivery. We'll continually be tracking that to either improve the customer journey, to improve the content and messaging. And then we'll also do an evaluation meeting at the end to look at what we've learnt, what will be improved, what can we put into place for the next campaign" (Interview 12)</i></p>
Commercial partner respondent E	<p><i>"we do have that evaluation that shows weight losses from our point of view. And again, I guess that goes back to the trust, to how many people did we engage. Because we engaged them via the How Are You tool and so we were able to track that journey that they made" (Interview 21)</i></p>
Local authority respondent B	<p><i>"with our wellbeing service we can record whether somebody's come into the wellbeing service based on a certain campaign" (Interview 8)</i></p>
Local authority respondent A	<p><i>"we want to engage a big number of people. We want to be able to give them the tools and the resources to make a change, and we want to know if they have made a change. And we hope that by doing that we will then see a change in our, kind of, overall targets,</i></p>

	<i>which is the health indicators. We do want to see that over the two, three years we see a reduction in childhood obesity, that we see smoking prevalence drop” (interview 7)</i>
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Data Source	Findings – Value of relationship
Partnerships agency respondent C	<i>“we tried to measure the quality of the relationship, actually. We developed a survey-based methodology, which in recent years we haven’t used because of the proliferation of elections and the timing of those elections we’ve not really been able to do the kind of survey with partners we want to” (Interview 11)</i>
PHE respondent C	<i>“sometimes there are softer outcomes from partnerships as well. So, if I think about what I was saying before about small activity, getting started with a new partner, I think it’s quite legitimate that some of those outcomes are about rate of understanding and learning between the two sides of the partnership and increasing the will to work together” (Interview 14)</i>
PHE respondent A	<i>“the bulk of the work is about relationship...but it’s so long-term that it can feel quite intangible” (Interview 1)</i>
Partnerships agency respondent D	<i>“I think that you could argue that if a partner continues to work with PHE on a long-term basis, that is a measure of the fact that what PHE is doing is successful in how they work with partners” (Interview 19)</i>
Partnerships agency respondent D	<i>“I think that a successful outcome is the fact that there are certain partners that we have over time that keep coming back to supporting these campaigns. So, the fact that [partner name] has supported us for, I think we’re coming into our fourth or fifth year, I think is cognisant of the fact they wouldn’t do that if there wasn’t a successful outcome from their perspective, of working with us in a campaign. I think the success in terms of the outcome, the measures of success of a partnership is the continued engagement of that partner” (Interview 19)</i>

PHE respondent A	<i>"the outcomes are always quite hard to measure. I think an outcome that's hard to talk about is the relationship."</i> (Interview 1)
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Data Source	Findings – Partner investment
PHE respondent E	<i>"We have identified the top sort of ten, twenty partners who have the most impact, you know, are potentially investing the most amount of time and energy... And they're the ones that we really day to day manage really intensely and closely, so people like X and Y"</i> (Interview 16)
PHE respondent A	<i>"the thing you can measure is, like, what's the commitment and investment from the partner? So, if you look at X, there is a lot of mutual investment, like what they put in from a franchise perspective and from a reach perspective"</i> (Interview 1)

Data Source	Findings – Learnings
Partnerships agency respondent C	<i>"I think one of the key learnings out of that was you really have to involve the partner organisations in the development of the tools and the assets and the resources and the strategies. And you genuinely have to co-create to be successful"</i> (Interview 11)
PHE respondent E	<i>"I think the biggest learning for me is you can't turn up to any partner, whether they're a local authority partner, a public sector partner, a charity partner or a commercial partner, and present your agenda and assume that everyone is just going to get behind it. You have to be really thoughtful of how you create something together"</i> (Interview 16)
PHE respondent C	<i>"I think it's quite legitimate that some of those outcomes are about rate of understanding and learning between the two sides of the partnership, and increasing the will to work together"</i> (Interview 14)

Data Source	Findings – Outcome for partner
PHE respondent E	<p><i>“for the partner it’s about being seen by government to actually be standing up and supporting the public health agenda”</i></p> <p><i>“it’s beyond public health, it’s more about, you know, we X or we Y or whoever is stepping up and delivering on, you know, what government is saying is important”</i></p> <p>(Interview 16)</p>
Commercial partner respondent C	<p><i>“it gives us credibility. When we’re discussing things like the childhood obesity strategy, it gives us credibility”</i></p> <p><i>“it’s given our promotions a bit more credibility, because it’s been backed up and linked in with adverts for Change4Life”</i> (Interview 9)</p>
Commercial partner respondent B	<p><i>“I think it gives us credibility, I think that’s the primary thing. I think it helps in terms of people trusting us. We become a much more, I mean, we are already a trusted brand. But by doing that really does help to give us more trust and I think it helps across all stakeholders from our people who are delivering our services through to the people we might want to influence. To see us working in partnership is very, very positive and strong from all those people”</i> (Interview 8)</p>
Commercial partner respondent D	<p><i>“one of the things that was really exciting for us for the One You campaign particularly from a X point of view was the innovation in terms of digital. Because it forced us in a way to develop something and to try something that perhaps we wouldn’t have done if One You hadn’t, the whole sort of How Are You tool thing.”</i> (Interview 21)</p>
Local authority respondent A	<p><i>“we very much benefit from the resources, the insight, and the development of the campaign that goes on from PHE and the agencies you work with. We benefit from the resources that you kind of provide and the suggested kind of ways to implement locally and the suggested content. That’s all stuff we would love to do ourselves,</i></p>

	<p><i>but actually we get real value from being able to pick it up and take it"</i></p> <p><i>"the biggest benefit for me is that we could never spend that amount of money to go and do the research into the target group, into the motivations, into the design of the campaign, into the kind of establishment of a brand that PHE can do. So, the value there is absolutely there. We can take kind of work that's been done, apply it either straight into the service, if it works, or tweak elements of it to kind of make it slightly more bespoke for our service users" (Interview 6)</i></p>
Local authority respondent B	<p><i>"I'd say this partnership probably feels more like PHE do more of the, kind of, giving in it and actually from a local authority point of view we probably, kind of, benefit from that"</i></p> <p><i>"I think without having the, kind of, stuff drafted that come from PHE that we are able to either just use straight out of the bag or localise to some degree, I don't think we'd be able to work or to support them as we do now"</i> (Interview 7)</p>
Local authority respondent D	<p><i>"there's a lot of credibility behind PHE campaigns. They were valued, the resources are fit for purpose, they act on feedback based on what the partners give back, and there's the exchange of data as well"</i></p> <p><i>"well, there's a massive cost-saving. There's the visibility and leverage of using a national, recognisable brand, which you would never be able to create at a local level unless you had stacks of money...there's the flexibility of utilising the brands and tools at a local level, so they're not so prescriptive that local areas can't flex them to specific services or programs" (Interview 13)</i></p>
Local authority respondent E	<p><i>"it allows us to focus on targeting our people without having to develop the resource" (Interview 20)</i></p>

Partnerships agency respondent B	<i>"I think there's also something useful for corporates to work more hand-in-hand with local authorities and charities, and it's useful for corporates to work with each other and for local authorities to work with each other, so I think there's a mutual benefit in terms of best practice, networking, building better allegiances" (Interview 5)</i>
Commercial partner respondent A	<i>"so, actually having that, you know, coalition of partnerships where you're bringing people who've got a different role to play, a real diversity" (Interview 3)</i>

Data coded to “Other”

Data Source	Findings – Partner Needs
Local authority respondent E	<p><i>“We want to link people into a smooth customer journey for them, if we’ve got a service. Whereas sometimes the [PHE] campaigns will be about getting to a national point. So, I think it’s just trying to understand where best we can adjust those if we need to. In terms of the apps as well it’s, you know, it’s very difficult to get people to put post codes in. And we would expect that. But even if it’s just an indication of how many people have downloaded or come to the pages from there.”</i></p> <p><i>“Just so I can say, actually it’s worth us getting our residents to download these apps because actually they’re effective. But I can’t say that at the moment.”</i></p> <p><i>(Interview 20)</i></p>
PHE respondent A	<p><i>“On the commercial side, it’s really about achieving some social responsibility or sustainability objectives. It’s also an opportunity, a very practical opportunity, to, sort of, encourage their customers to buy products that are healthy. So, it’s about driving sales as well.”</i></p> <p><i>(Interview 1)</i></p>
Commercial partner respondent A	<p><i>“We like to plan a season in advance. And therefore we know the earliest we can go out the bigger results we’ll have. And we know at a certain point in time if we can’t go out or something even prospective even a Save the Date then actually we’ll have some significant implications.”</i></p> <p><i>“quite problematic last year because of, you know, delays in terms of the time.”</i> (Interview 4)</p>
Commercial partner respondent C	<p><i>“Timing, not understanding each other’s timings. The long-term marketing plans are really set in stone. So, I understand you’ve got to go through your process. We’ve got to understand each other’s processes really, and timescales.”</i> (Interview 9)</p>

Commercial partner respondent B	<i>"It does inasmuch as we are a large retail pharmacy chain, so we've got 1,800 stores. So our planning process is quite lengthy." (Interview 8)</i>
Commercial partner respondent D	<i>"It is a challenge because PHE makes every effort to share 18-month calendars, which is brilliant. The reality is they only have annual budgets and actually, within that, in some instances, the reality is they've only got project budgets." (Interview 11)</i>
Partnerships agency respondent B	<i>"And we can sometimes not help ourselves by being very late to give them stuff, by asking them to keep things secret or embargoed when actually it would be easier for them to share it earlier. Some of our campaigns are activated at unhelpful times of the year, so January, which means that people's runup to Christmas might be a bit more workload-heavy than they would ideally want it to be." (Interview 5)</i>
PHE respondent A	<i>"And so, I think government timelines move around a lot." (Interview 1)</i>
Partnerships agency respondent D	<i>"Timing is often, can be a challenge for partners. So, we sometimes, of course, do need to move our campaigns around for various things, whether it be from a policy perspective, the needs from policy, or indeed from a budget perspective. And so that sometimes makes it, means that a campaign would best suit a partner in a particular time period, and if we have to move it, then it doesn't then suit their calendar. And so, it sometimes means that that partner can no longer support. It is a reality of things, and that's unfortunately not something that can change. But we look to try and mitigate that by looking at ways in which we can still work with that partner or find a smaller, a different kind of opportunity at a later date." (Interview 19)</i>

